



Job Aid



How To Guide on Central Fill and Packagers

[Setting Up
Groups](#)

[Setting Up
Prescriptions](#)

[Overview of the
CAP Window](#)

[Sending the File](#)

[Packaging](#)

[Troubleshooting](#)

Setting Up Groups – Packager Preferences

Discrepancies can occur when group preferences are not set correctly. One area to check is the **Group Packager Preferences** window.



NOTE: For retail group prescriptions, the packager set in the Group Preferences tab is not inherited. The packager must be set in Rx Detail if it's different than what's set in the Drug Folder.

From the **Packager** button of the Group Preferences tab, ensure that:

1. **Group Packager** is pointing to your device or Central Fill.
2. The correct **Card Type** is indicated (for SynMed Devices).
3. All applicable **Prescription Types** that will be packaged through your device are selected.



WARNING! If one of the required types is not selected, those prescriptions will not be included in the Compliance Automated Packaging window.

Setting Up Groups – Rx Status

You can group your patients using either Retail or Non-Retail groups to enhance the process of batching and sending prescriptions to a packager or Central Fill. If using a Non-Retail group, be sure to review your **Rx Status Preferences** window.

From the **RXSTATUS** button of the Group Folder, ensure that:

1. The **Batch** check box is selected next to each Rx Status code to be batch filled.
2. The **ADI** check box is selected for each Rx Status code that needs to be sent through to the Compliance Automated Packaging Window.



NOTE: Correct settings are required at the group level for Non-Retail groups to ensure prescriptions are successfully transmitted to the Compliance Automated Packaging (CAP) window for packaging and sending to Central Fill.

Monday Group Grp #: 7 Primary Doctor: Package: Current Central Fill Location - S... Last Batch ID: 4299

Propel Rx - Group Rx Status Preferences

Code	Description	Batch	TMR	Order	MAR	Order	P MAR	Order	TAR	Order	ADI
A	Active Regular Dose	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>
C	First Fill Print Only External	<input type="checkbox"/>	<input checked="" type="checkbox"/>	11	<input checked="" type="checkbox"/>	11	<input type="checkbox"/>	11	<input type="checkbox"/>	11	<input checked="" type="checkbox"/>
D	Daily (Monthly NH Only)	<input type="checkbox"/>	<input type="checkbox"/>	14	<input type="checkbox"/>	14	<input type="checkbox"/>	14	<input type="checkbox"/>	14	<input checked="" type="checkbox"/>
F	Inactivate Government	<input type="checkbox"/>	<input type="checkbox"/>	13	<input type="checkbox"/>	13	<input type="checkbox"/>	13	<input type="checkbox"/>	13	<input type="checkbox"/>
G	Active Government Regular Dose	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>
I	Inactivate Regular	<input type="checkbox"/>	<input type="checkbox"/>	12	<input type="checkbox"/>	12	<input type="checkbox"/>	12	<input type="checkbox"/>	12	<input type="checkbox"/>
N	Active Government Non-Drug	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8	<input checked="" type="checkbox"/>	8	<input checked="" type="checkbox"/>	8	<input type="checkbox"/>	8	<input checked="" type="checkbox"/>
O	Active Non-Drug	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	7	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>
P	First Fill Print Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	3	<input type="checkbox"/>
R	Active Government PRN Dose	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>
T	Active Treatment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9	<input checked="" type="checkbox"/>	9	<input checked="" type="checkbox"/>	9	<input type="checkbox"/>	9	<input checked="" type="checkbox"/>
V	Active Government External	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	6	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>
W	Active PRN Dose	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>	10	<input checked="" type="checkbox"/>

Reset Revert OK Cancel

REPORTS TP RULES **RXSTATUS** SAVE CLOSE REVERT

Setting Up Prescriptions – Administration Details Window

In the Administration Details window, ensure that each prescription being sent to the CAP has the following settings:

1. The **Compliance Pack** checkbox is selected.
2. Proper **Admin Times** for the 4 pastimes are indicated, where applicable. Ensure the value is indicated in 24-hour time, 4 digits long and separated with a colon (:).
 - e.g.: Admin Times: 08:00,,17:00,22:00
 - This example implies the doses will be in the first, third, and fourth slots. The second slot will be skipped over, as indicated by the double comma.
3. An appropriate **Rx Status** has been selected.
4. The **Packager** is pointing to the correct device or Central Fill Location.
5. The correct **Card Type** is indicated (for SynMed devices).
6. The correct **Frequency** is indicated.
7. The correct **Dose** to be taken is input next to each of the Admin Times indicated.



TIP: Select the **Calendar** tab to confirm the correct doses appear on the listed days. Select **Clear Dosages** to remove all dosages before making a change.

Propel Rx - Rx Detail - Administration Details: SYNTHROID 25MCG TABLET

Group: Monday Group Drug: SYNTHROID 25MCG

Rx Status: A - Active Regular Dose **3** Instructions: TAKE 1 TABLET ONCE DAILY

Route: ORAL

Calendar

Admin Times: 08:00 **2** Compliance Pack **1** **4** Packager: Current Central Fill Location - SynMed File La

Frequency: Daily **6** Central Fill Print Only **5** Card Type: 4 - Jones card

Packaging

Report Type: Regular Report #: Default

Start Date: 4/26/2023 (Day 1 of this pattern) Stop Date: None

Admin Times	Dose
08:00	1 7

Clear Dosages

OK Cancel

Opening the Compliance Automated Packaging (CAP) Window

The first step in sending your prescriptions to a packager is to open them in the Compliance Automated Packaging window.

1. Navigate to the **Compliance** tab of the Workbench.
2. Select the **Packaging** queue.
3. Highlight a prescription configured for the desired packager.
4. Select **Process**.
5. From the **Workflow** window, select the **All Prescriptions for Packager** option, then select **Process**.

The Compliance Automated Packaging (CAP) window will open.

Workflow 13 | **Parked Rx** 0 | **Dialogue** 4 | **Pick Up/Delivery** 0 | **Messages** 89 | **Fax** 0 | **Activities** 536

	Overdue	0-1 hr	1-2 hrs	2-4 hrs	4+ hrs	Tomorrow +	Compliance	Parked	Total
Data Entry	1						3		4
Clinical Review									
2 Packaging	2						6		8
Technical Validation							1		1

1 **COMPLIANCE (5)**

Ready Time	Workflow	Patient	Packager Status	Packager	Group
3 <input checked="" type="checkbox"/> Apr 26 11:01 PM	Packaging	Doe, Jonathan	Queued	Current Central Fill Location - SynMed File Layout	Mond
<input type="checkbox"/> Apr 26 11:01 PM	Packaging	Doe, Jonathan	Queued	Current Central Fill Location - SynMed File Layout	Mond
<input type="checkbox"/> Apr 27 07:00 PM	Packaging	Smith, Don	Queued	Current Central Fill Location - SynMed File Layout	Mond
<input type="checkbox"/> Apr 27 07:00 PM	Packaging	Smith, Don	Queued	Current Central Fill Location - SynMed File Layout	Mond
<input type="checkbox"/> Apr 27 07:00 PM	Packaging	Smith, Don	Queued	Current Central Fill Location - SynMed File Layout	Mond

5 Propel Rx - Workflow

There are additional prescriptions for this Patient, Group and/or Packager. What would you like to process?

- Selected Prescriptions Only
- All Prescriptions for Patient Doe, Jonathan (2)
- All Prescriptions for Group Monday Group (5)
- All Prescriptions for Packager Current Central Fill Location - SynMed File Layout (5)

4 **PROCESS**

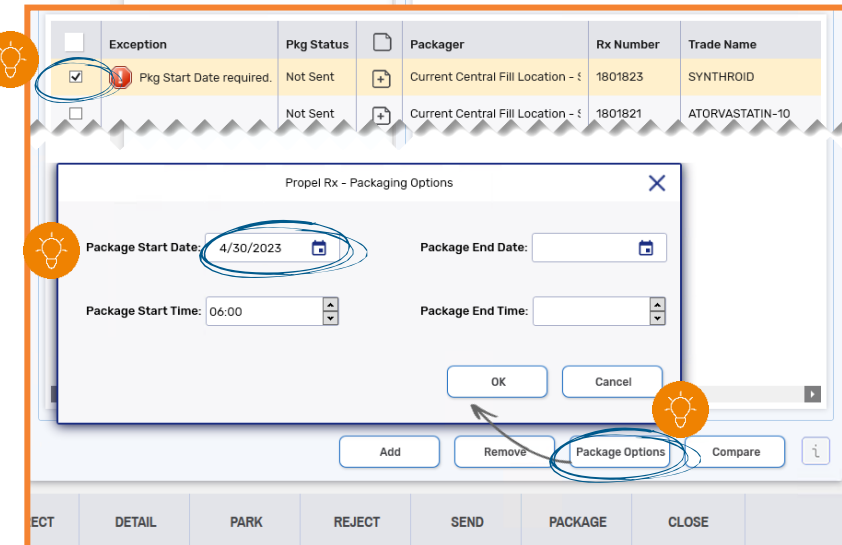
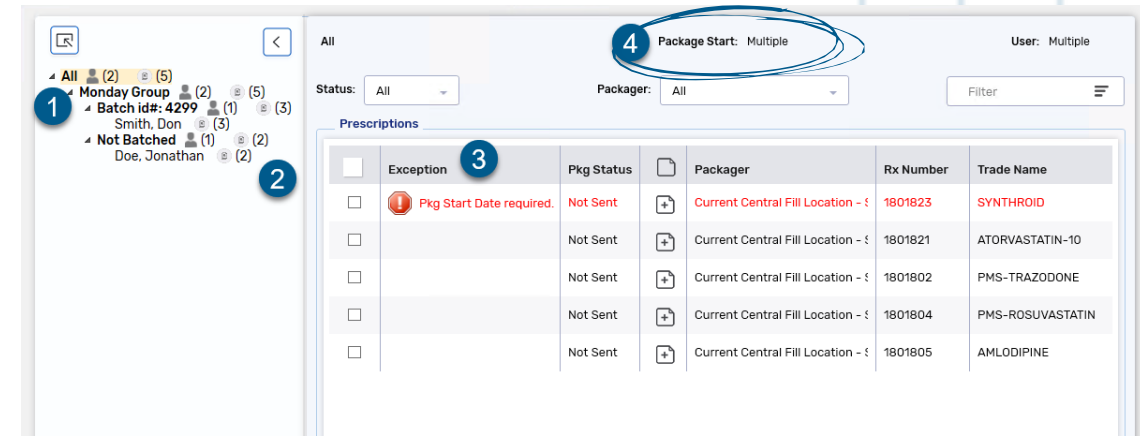
There are additional prescriptions in the pharmacy for:

PATIENT: Doe, Jonathan
 Packaging Rx 1801821 ATORVASTATIN-10 10MG
 Data Entry Rx 0 TEVA-OXYCOCET 5&325MG

GROUP: Monday Group
 Packaging Rx 1801804 PMS-ROSUVASTATIN 10MG
 Packaging Rx 1801805 AMLODIPINE 5MG
 Packaging Rx 1801802 PMS-TRAZODONE 50MG

CAP Window Pointers – Overview and Exceptions

1. In the tree view on the left side of the window, select the **All** or **Group name** header to bring all prescriptions into view.
2. Ensure that the correct number of prescriptions is indicated next to the patient's name. If you do not have all the prescriptions for the patient, rebill the prescriptions which are not present.
 - Prescriptions processed outside of the batch will be separated into a 'Non-Batched' section. Be sure to add the prescription totals for the specific patients from both sections
3. Correct any **Exceptions** which display in the **Prescriptions** section.
4. Ensure all prescriptions have the correct **Package Start Date**. A Package Start of 'Multiple' implies the listed prescriptions have different start dates and/or start times.



TIP: To change the **Package Start Date**, first select the checkbox next to the desired prescription(s), then select **Package Options**. Set the **Package Start Date** and **Time** (where applicable) in the window and select **OK**.

CAP Window Pointers – Compare

Once all Exceptions have been addressed, select **Compare** to check for accuracy. Address any **Warnings** returned.

a) Different Package Date/Different Package Time

- Indicates there are prescriptions for the same patient with a different Start Date, End Date, Start Time, or End Time.
- Resolve by using **Package Options**

b) Different Packagers/Card Types Detected

- Indicates there are prescriptions for the same patient which are indicated for different packagers.
- Resolve by **Rebilling** if this was not intentional.

c) Prescriptions Added/Removed

- Indicates a prescription for a patient has been added or removed since the last transmission.
- Resolve by rebilling the missing prescriptions to add in Packager information, if not intentional.

d) Other Prescriptions in Workflow

- Indicates there are additional prescription(s) for the patient in Workflow which are not in the CAP window.
- Resolve by locating the prescription in Workflow and determining whether it should be included in the batch to be sent to the Packager or Central Fill.

Exception	Pkg Status	Packager	Rx Number	Trade Name	Stre
<input checked="" type="checkbox"/>	Not Sent	Current Central Fill Location - s	1801823	SYNTHROID	25M
<input checked="" type="checkbox"/>	Not Sent	Current Central Fill Location - s	1801821	ATORVASTATIN-10	10M
<input checked="" type="checkbox"/>	Not Sent	Current Central Fill Location - s	1801802	PMS-TRAZODONE	50M
<input checked="" type="checkbox"/>	Not Sent	Current Central Fill Location - s	1801804	PMS-ROSUVASTATIN	10M
<input checked="" type="checkbox"/>	Not Sent	Current Central Fill Location - s	1801805	AMLODIPINE	5MG



TIP: Click the checkbox next to the Warning to move it to the bottom of the list. Once complete, run **Compare** once more to ensure only acceptable Warnings remain, if any.

CAP Window Pointers – Sending the File

After reviewing and/or addressing all Warnings in the Compare window, it's time to send the order to the packager or Central Fill.

- 1) Select the **All**, **Group Name**, or **Batch ID** of the prescriptions you wish to send from the tree view on the left.
- 2) Confirm the **Package Start** date is correct.
 - A Package Start of 'Multiple' indicates different start dates or times for the prescriptions under the selected header. Click the checkbox next to the desired prescription(s) and select **Package Options** to make any necessary corrections.
- 3) Click the checkbox next to the prescription(s) you wish to send.



TIP: Click the checkbox in the header to select all prescriptions visible in the window

- 4) Select **Send**.
- 5) A validation prompt will appear. Select **Yes**.
- 6) Loading prompts will display. Once the send is successful, the **Pkg Status** of the sent prescriptions will update to **Sent** with a date and timestamp of when the prescriptions were sent.
- 7) Select **Close** to return to the Workbench.


Select the arrow to expand or collapse the Compare Window.

The screenshot shows the 'Monday Group Compare' window. On the left, a tree view shows 'Monday Group' selected with a checkbox (1). The main table lists prescriptions with columns for PatientName, WARNING, Packager, Rx Number, and Tr. A 'Package Start' of 'Multiple' is shown at the top right (2). Below the table, a 'Prescriptions' table shows details for each prescription, including Exception, Pkg Status (Not Sent), Packager, Rx Number, Trade Name, and Strength. A 'SEND' button is circled (4). A 'Pkg Status' dropdown menu is open, showing 'Sent - Apr 27, 2023 - 05:41 PM' (6). A warning dialog box is displayed at the bottom, asking 'Highlighted prescriptions will be sent to Packager.' with 'Yes' and 'No' buttons (5). A 'CLOSE' button is also visible (7).

CAP Window Pointers – Packaging

Packaging occurs after you have physically packaged the medication or received the order from Central Fill.



TIP: If receiving from Central Fill, highlight all Sent prescriptions from the Workbench, then select the **Ready Time** icon  and **Specify Time** to move the ready time to the date you will receive the order from Central Fill.

1. After receiving or physically packaging your order, open the **CAP** window by selecting the **Packaging** Queue from the **Compliance** tab of the Workbench.
2. Highlight a prescription previously sent to the packager.
3. Select **Process**.
4. From the Workflow window, select the **All Prescriptions for Packager** option, then select **Process**.
5. Select the correct header from the tree view, if required.
6. Select the checkbox in the header to highlight all prescriptions previously sent.
7. Select **Package**.
8. Select **Yes** on the validation prompt.

You're done! The prescriptions will move to the next workflow stage depending on your Packager configuration.

The screenshot displays the 'Monday Group' interface with the following elements:

- Tree View (5):** Shows a hierarchy: All (2) (5) > Monday Group (2) (5) > Batch id: 4299 (1) (3) > Smith, Don (3) > Not Batched (1) (2) > Doe, Jonathan (2).
- Table (6):** A table with columns: Exception, Pkg Status, Packager, Rx Number, and Trade Name. All rows are checked in the Exception column.
- Dialog Box (8):** A 'Propel Rx - Warning' dialog with the text: '5 RXs will be marked as Packaged. Do you want to continue? (Note: ** Please ensure all necessary Rx's have been sent to the Packager before completing this action.)' with 'Yes' and 'No' buttons.
- Navigation Bar (7):** Buttons for RX, CORRECT, DETAIL, PARK, REJECT, SEND, PACKAGE (circled), and CLOSE.

Troubleshooting

What if I need to resend a prescription to the Packager or Central Fill?

To return a previously sent or packaged prescription to the **Packaging** queue of the **Compliance** tab, highlight the prescription from the **Patient Profile** tab then select **Correct > Amend**. Make any changes, if necessary, then select **Save**. The prescription will appear in the **Packaging** queue of the **Compliance** tab.

Note: If the prescription requires no edits and has a Workflow status of Packaging, and simply was not captured when the CAP window was opened, select **Add** then input the prescription number in the prompt to import the prescription in the CAP window.

What do I do if my patient is in the wrong group?

To change a patient's group, navigate to the **Groups** tab in **Patient Folder Main** tab. Highlight the group and select **Move** to open the Group Search window, where you can search for and select the correct group. Be sure to select **Yes** to the prompt to carry over all the prescriptions for the patient.

Why do some prescriptions not have a Package Start Date?

Any prescriptions which were processed outside of a batch will not have a Package Start Date. From the Compliance Automated Packaging window, select the checkbox of the prescription missing the Package Start Date, then select **Package Options** to indicate the desired Start Date for the prescription.

I've already marked my prescriptions as Packaged, but my patient has brought in new insurance so now I need to rebill to their new plan. What should I do?

Be sure to mark prescriptions as **Packaged** again after making any corrections.

As mentioned above, Amending or Rebilling a prescription will return it to the **Packaging** queue of the **Compliance** tab, allowing you to pull the prescription back into **CAP** window to send or package again. Likewise, if rebilling or amending a prescription after it's been marked as Packaged, it is critical the prescription be processed in the **CAP** window and Packaged again for the proper management of Workflow and prescriptions sent to packagers.