Job Aid

propel Rx

McKESSON Canada

PHARMACY TECHNOLOGY SOLUTIONS
A DIVISION OF McKESSON CANADA

How To Guide on Groups and Batching

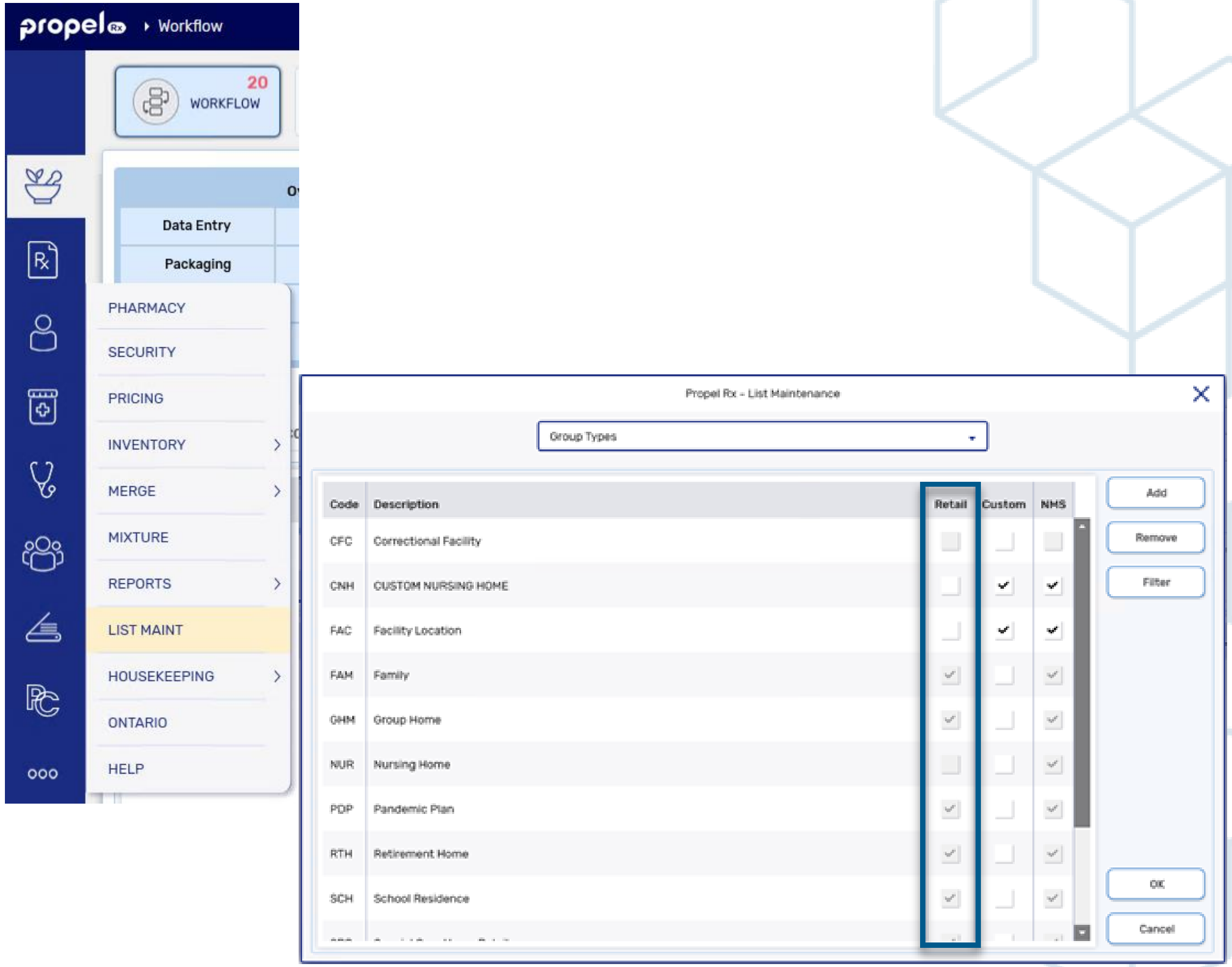
Introduction to Groups – Group Types

In Propel Rx, you can designate one of two group types when creating a group:

1) Retail Group:
   - Used for batch processing, compliance patients, and sending to packagers
   - Example Retail Group Types include Family, Group Home
2) Non-Retail Group:
   - Group Rx Statuses can be assigned to prescriptions
   - Used for MAR and TAR reports
   - Can also be used for batch processing, compliance patients, and sending to packagers
   - Example Non-Retail Group Types include Nursing Home, Facility Location, Correctional Facility

Group Types can be managed by navigating to **More (…)› List Maintenance** and selecting the **Group Types** list.

A checkmark in the Retail column indicates a **Retail Group Type**. If the checkbox in this column is unchecked for a Group Type, this indicates a **Non-Retail Group Type**.

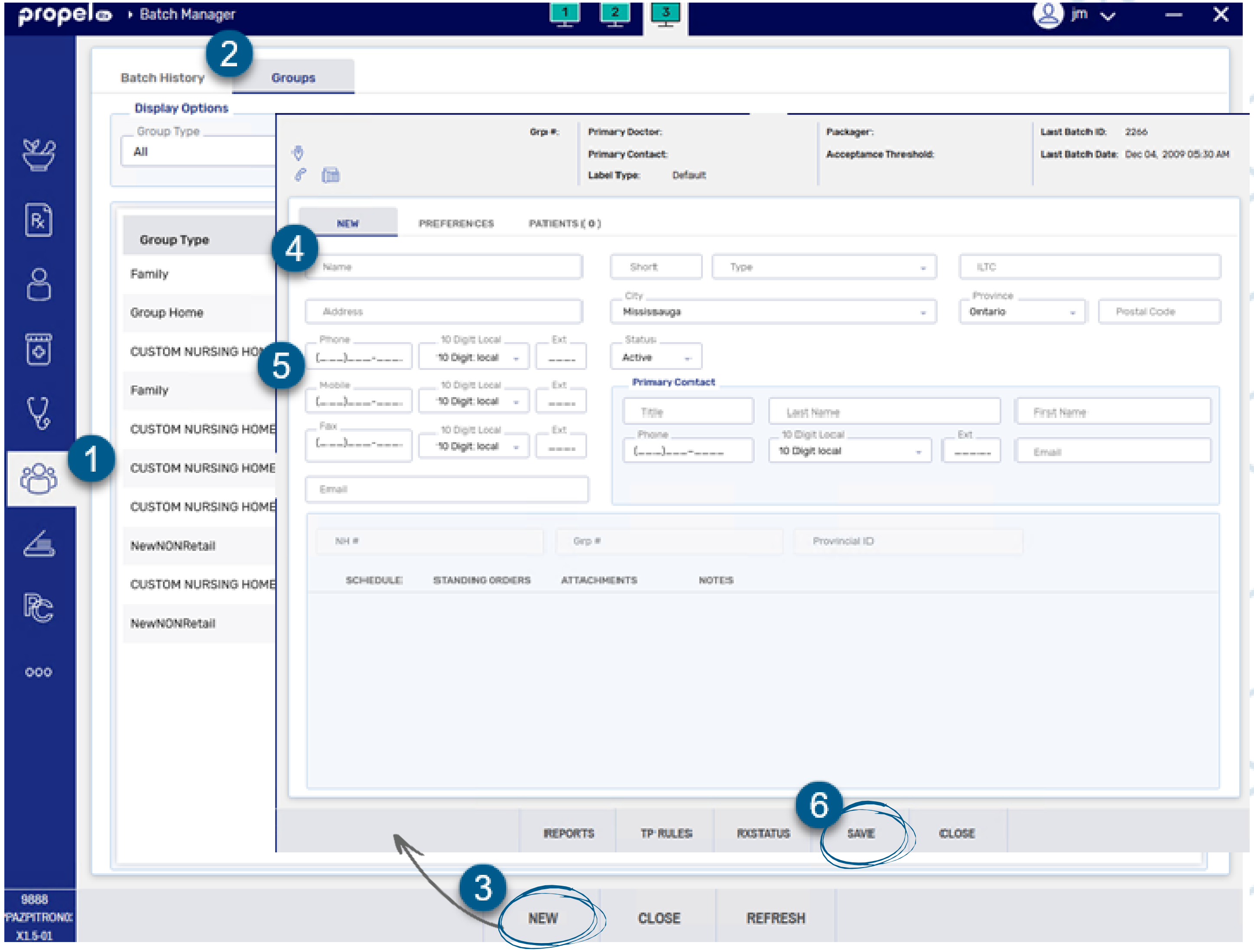


Creating a Group

Creating and managing groups is done from the **Groups** tab of the **Batch Manager**.

To create a new group:

1) Navigate to the **Batch Manager**.
2) Select the **Groups** tab.
3) Select **New**.
4) Input information in mandatory fields of Group Name, Short Name, Group Type, and Address.
5) Enter in any additional information as desired in the optional fields.
6) Select **Save**.



The group has now been created.

Creating a Group – Admin Times

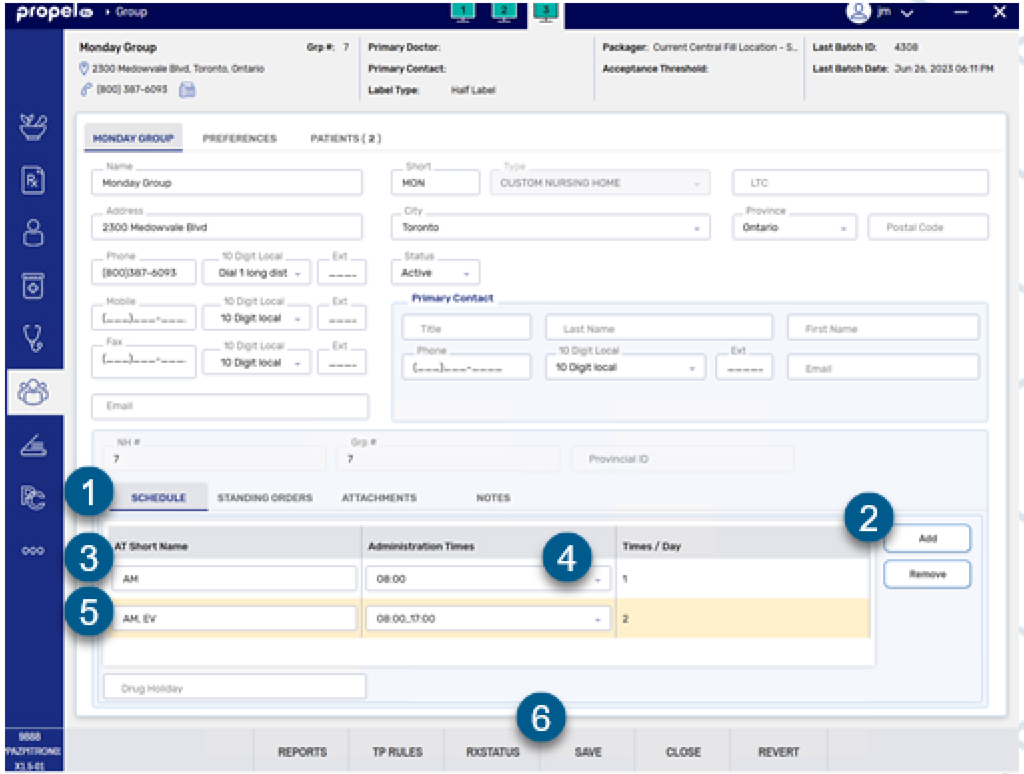
You may choose to add common **Admin Times** to a group if its patients require MAR Reports. Inputting Admin Times in the Group Folder generates a dropdown list in the Rx Detail Administration Details window for the grouped patients.

After detailing or creating the desired Group:

1) Select the **Schedule** tab.
2) Select **Add**.
3) Indicate a short name for the Admin Time in the **AT Short Name** field.

TIP: AT Short Names can be used to sort MAR and TAR reports.

4) Indicate the Admin Time in the **Administration Times** field.
   a) Must be entered in the 24 hour format, with colons (:) separating the hours and minutes, and commas (,) separating the times.
   b) Examples:
      i. 08:00,12:00,17:00,21:00
      ii. 08:00,12:00,,21:00
      iii. 08:00,,,21:00
      iv. ,,,21:00
5) Repeat steps 2-4 to add any additional Admin Times.
6) Select **Save**. The corresponding value(s) will populate in the Times/Day field(s).



TIP: Compliance passtimes conversions can be used instead of inputting specific Admin Times when sending to a Packager. Conversions are: Morning = 08:00, Noon = 12:00, Evening = 17:00, Bedtime = 21:00

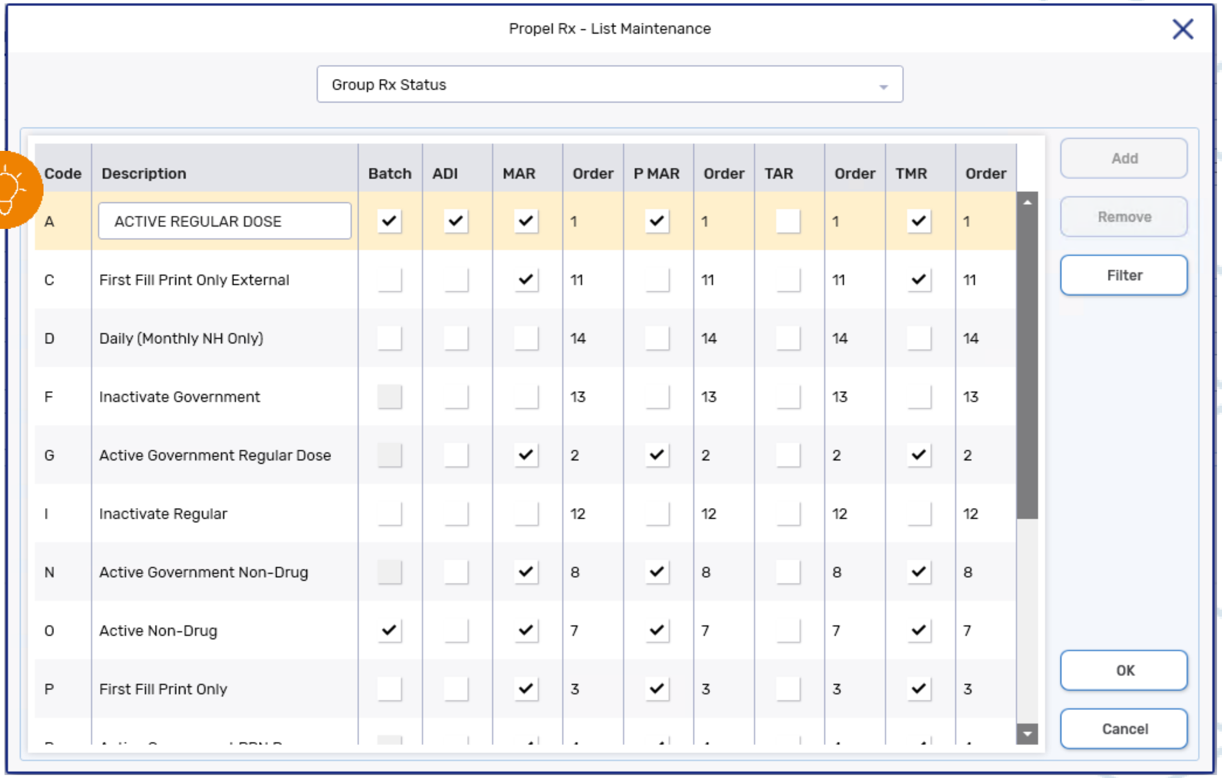
Creating a Group – Group Rx Status

Group Rx Statuses can be assigned to non-retail prescriptions to organize prescriptions for batch processing, or control which prescriptions appear on administration reports such as the MAR, MAR Partial, TAR, and TMR.

Group Rx Status selections and descriptions can be customized at the pharmacy level through **More (...)** > **List Maint** > **Group Rx Status**.

Customizations made to the Group Rx Statuses through **List Maintenance** will be default for all subsequent groups created in your pharmacy.

TIP: Try entering the descriptions of your commonly used Group Rx Statuses in uppercase letters to simplify locating and selecting the correct status for non-retail prescriptions in the **Administration Details** window.



Code	Description	Batch	ADI	MAR	Order	P MAR	Order	TAR	Order	TMR	Order
A	ACTIVE REGULAR DOSE	✓	✓	✓	1	✓	1		1	✓	1
C	First Fill Print Only External			✓	11		11		11	✓	11
D	Daily (Monthly NH Only)				14		14		14		14
F	Inactivate Government				13		13		13		13
G	Active Government Regular Dose			✓	2	✓	2		2	✓	2
I	Inactivate Regular				12		12		12		12
N	Active Government Non-Drug			✓	8	✓	8		8	✓	8
O	Active Non-Drug	✓		✓	7	✓	7		7	✓	7
P	First Fill Print Only			✓	3	✓	3		3	✓	3

Creating a Group – Group Rx Status Cont'd

To customize **Group Rx Status** selections for a specific group, select **RXSTATUS** in the Group folder.

Use the checkboxes to indicate if a Group Rx Status should be included in the function or report listed in the column header.

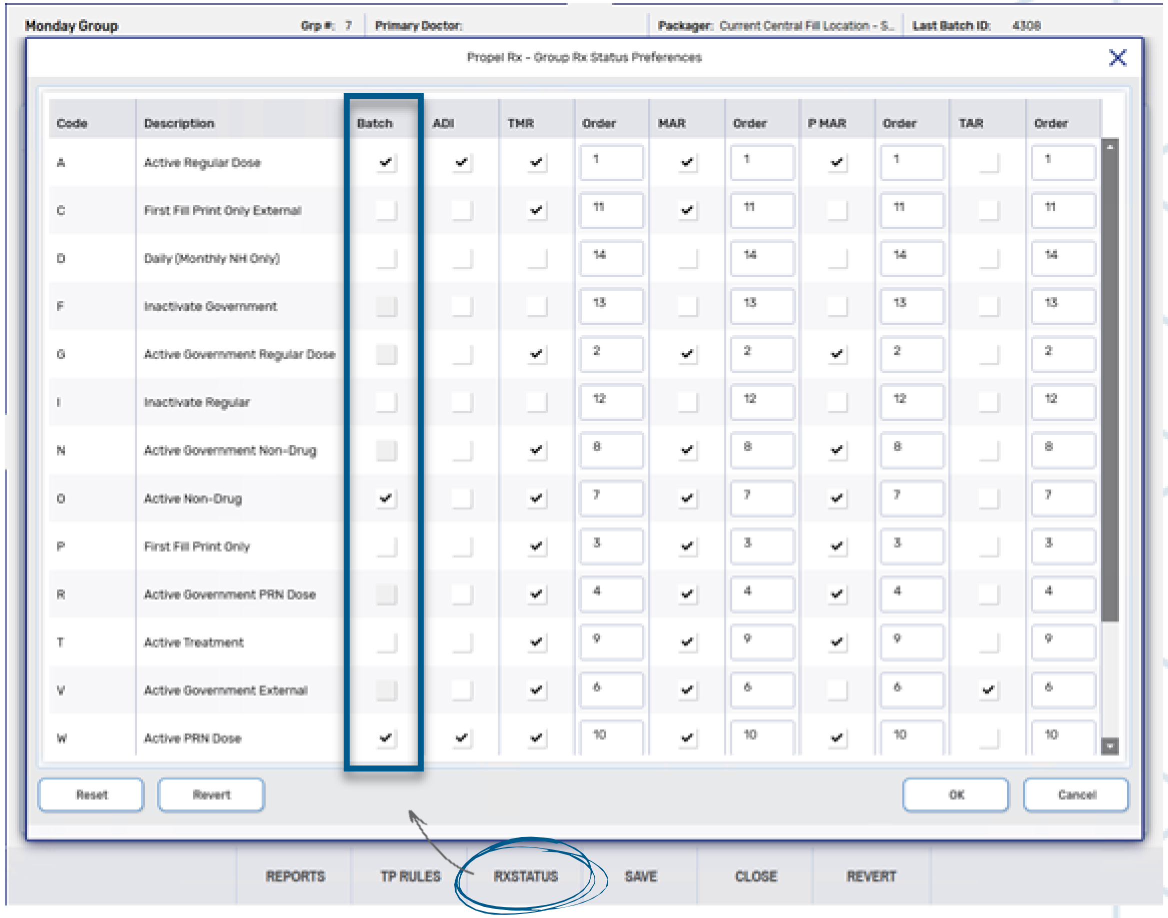
Batch: Select the statuses you wish to automatically populate in the Batch Preferences window.

ADI: Select the statuses which should be sent to the Packager, if applicable

TMR, MAR, PMAR, TAR: Select the statuses which should appear on the TMR, MAR, Partial MAR and TAR reports, respectively.

Order: ranking from 1-15 in which you wish for the statuses to appear on the corresponding report, listed in the adjacent column to the left.

Example: For a patient in the group whose **Group Rx Status Preferences** window is featured here, prescriptions with Active Regular Dose Group Rx Status A will automatically populate in the Batch Preferences window, should be sent to the group's listed packager, will be listed in the top priority on the TMR, MAR, and P MAR reports, and will not be included on the TAR Report.



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

TIP: Use caution as certain Group Rx Statuses do not generate billing nor deduct inventory (e.g., F, G, N, R, T, V, C, P, Z), or inactivate the prescription (I). See Understanding Group Rx Status Defaults for more details.

Creating a Group – Preferences Tab

Group and Batch preferences can be managed from the Group Preferences tab.

The following are preferences which impact your batch processing and MAR/TMR Reports, including recommended settings where applicable.

Reset Billing Code on Refill: Indicates whether the billing code should be reset when prescriptions of patients in this group are refilled.

Recommended: Default

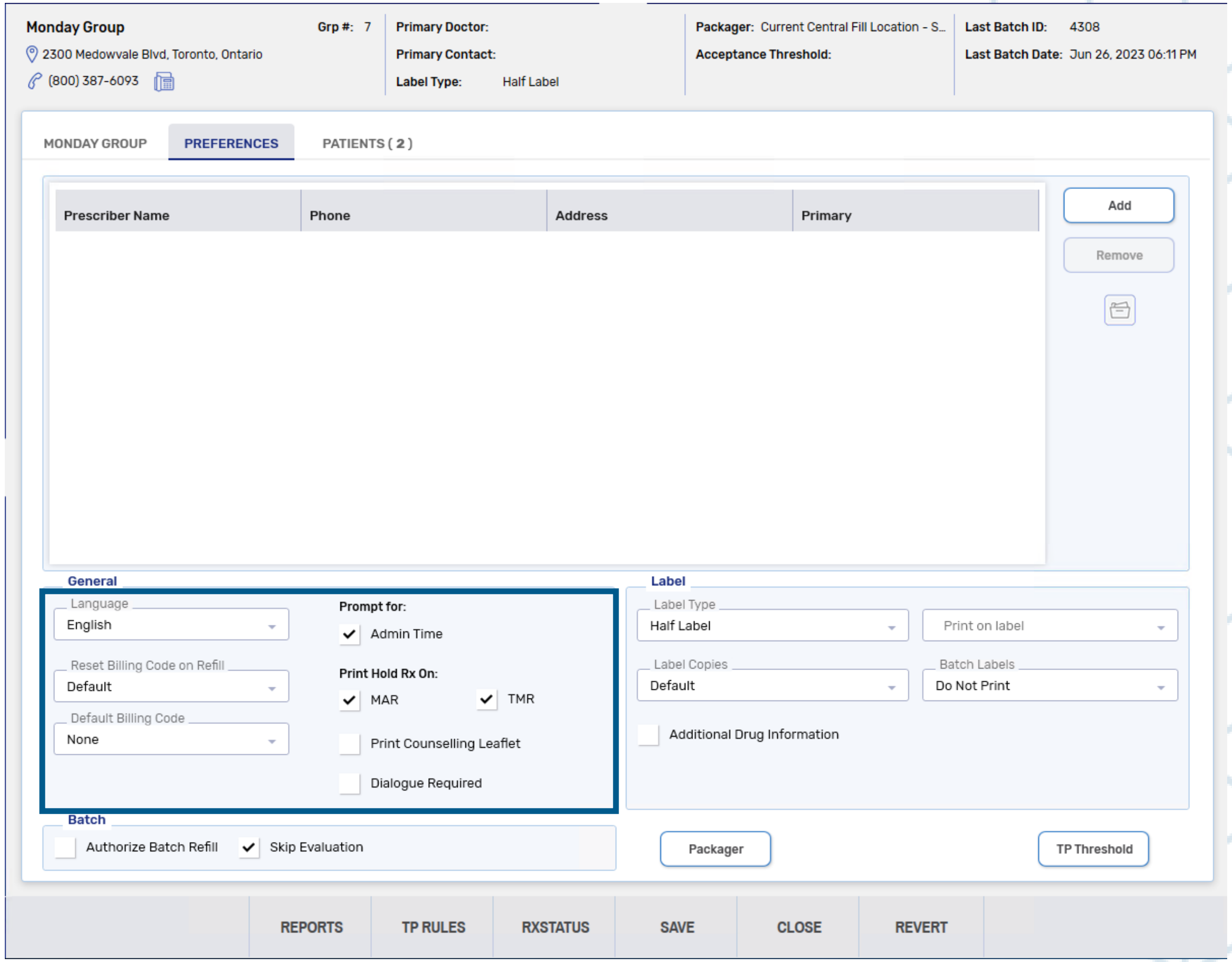
Default Billing Code: Billing code entered in this field will be automatically added to the Patient 3rd Party tab of the patients in this group.

Recommended: None

Prompt for Admin Time: If selected, administration times must be entered for all prescriptions of patients in this group.

Recommended: If using Admin Times for MAR, TMR, TAR Reports = ON. If not, OFF.

Print Hold Rx on MAR and TMR: If selected, Hold prescriptions will print on the MAR and/or TMR reports, respectively.



Creating a Group – Preferences Tab Cont’d

Label Type: Allows you to indicate the label type for the group’s prescriptions, whether batch processed or not.

Batch Labels: Determines whether labels are printed for prescriptions when they are batch processed.

Recommended: Do Not Print (when printing the Drug Record Book Report)

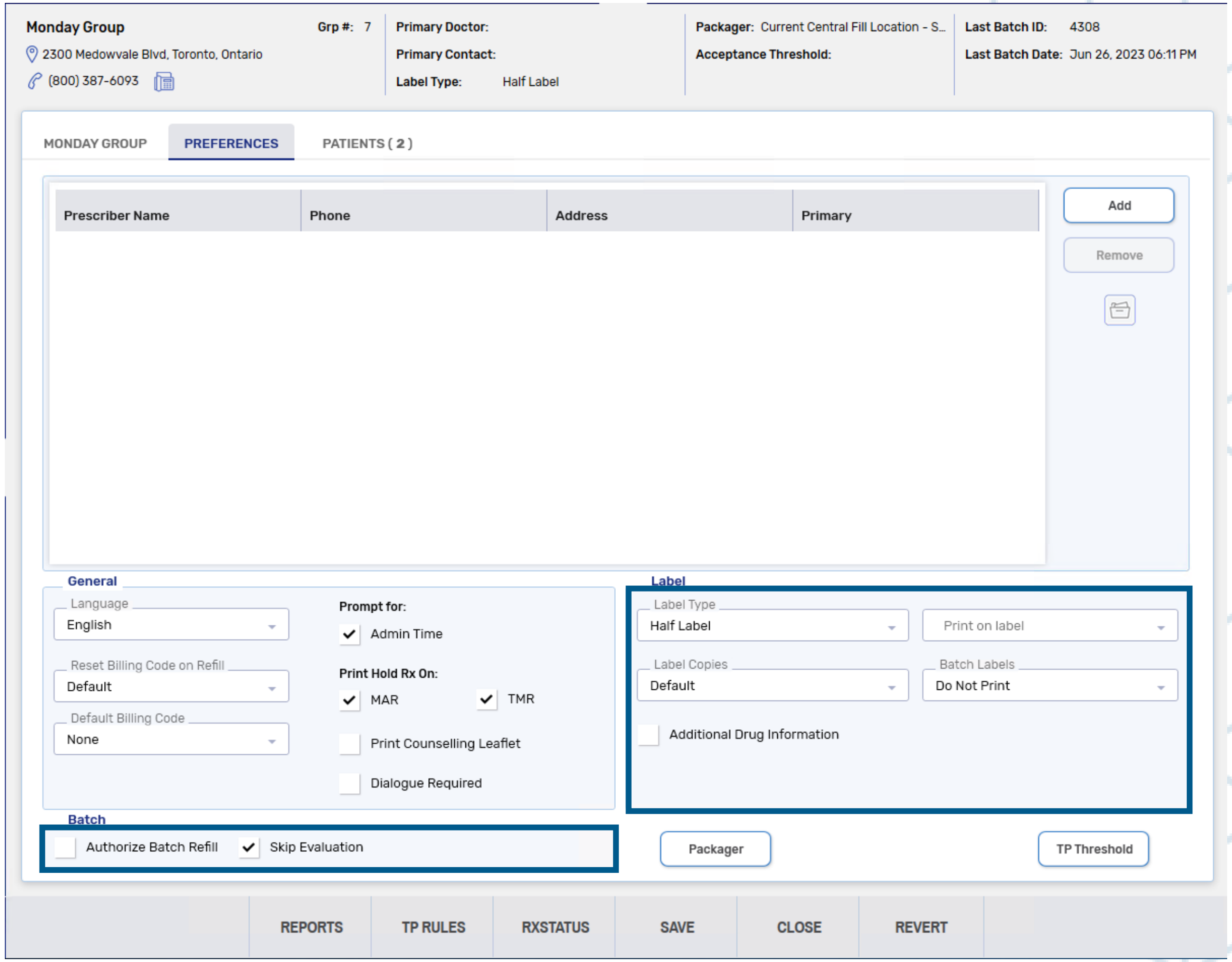
Authorize Batch Refill: Indicates if prescriptions in a batch should be automatically authorized when they do not have repeats remaining.

Recommended: OFF

Skip Evaluation: Allows prescriptions to be batch processed without interruption from minor alerts.

Recommended: ON

Visit the [Online Help]() for detailed descriptions of the fields in this tab.

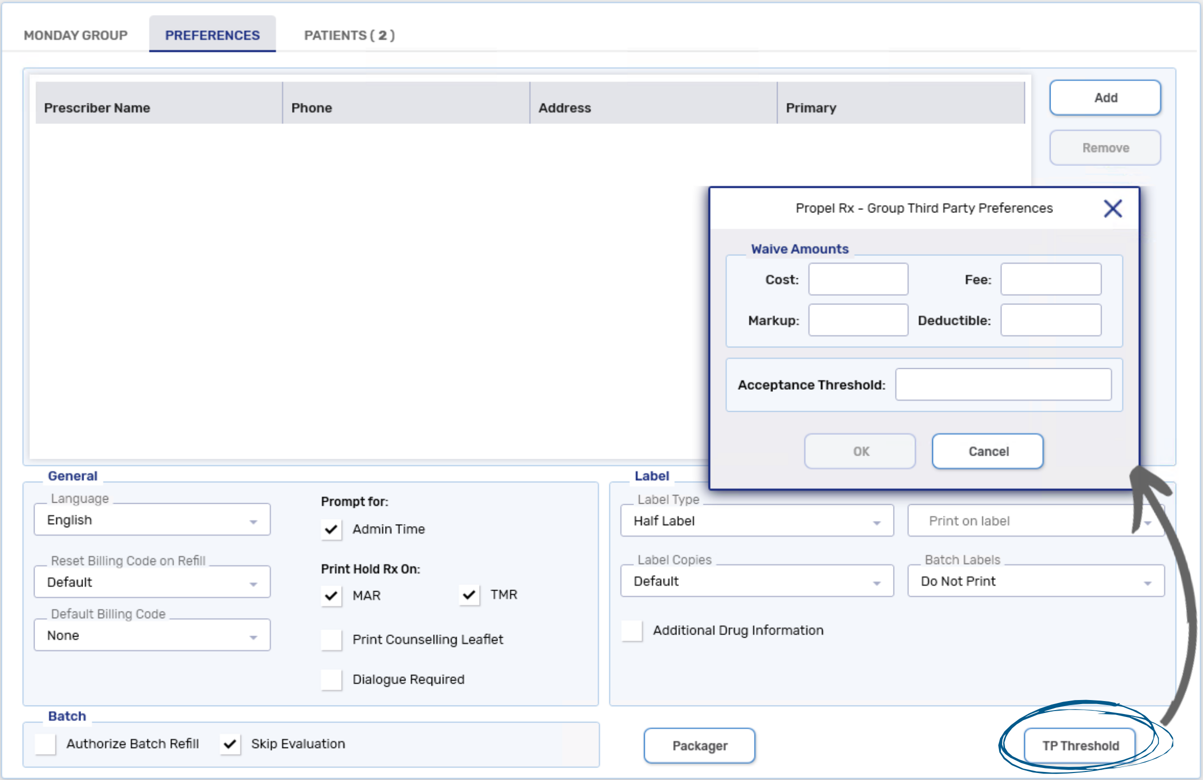


Creating a Group – Preferences Tab: TP Threshold

Waives and Third Party Thresholds can be indicated in TP Threshold if default waive amounts are required for a group.

Waive Amounts (Cost, Fee, Markup, Deductible): Indicates the amount you wish to have waived from the corresponding field.

Acceptance Threshold: The maximum value which will be automatically charged to the patient without forcing a review of the Claim Summary window or Patient Pays amount.



Creating a Group – Preferences Tab: Packager

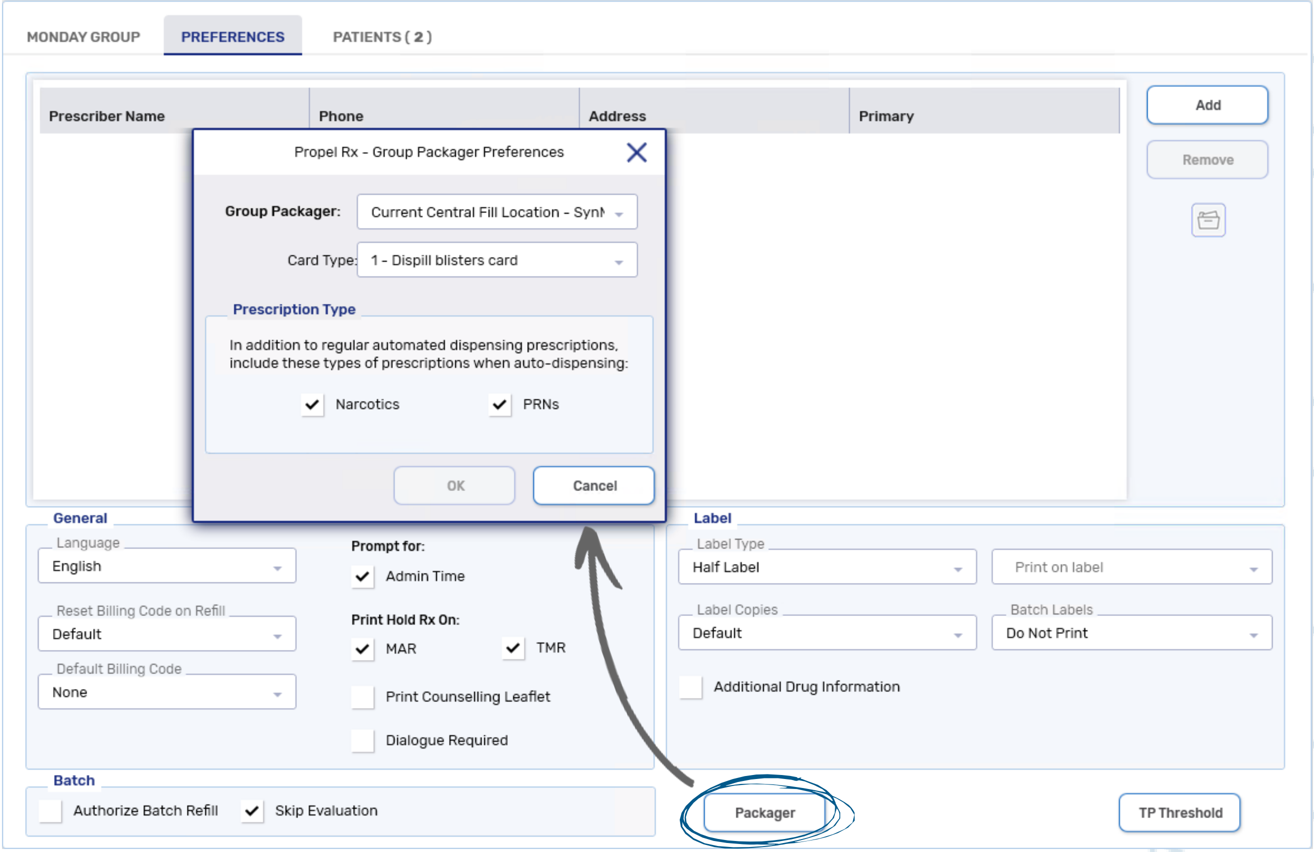
Packager preferences allow you to automatically populate the packager and card type, where applicable, in the corresponding fields in a new prescription's Administration Details window for patients in a non-retail group.

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.

Group Packager: Indicates the Packager or Central Fill location the applicable prescriptions in this group should be sent to

Card Type (if applicable): Allows specification of the card type the group's prescriptions should be packaged with

Prescription Type: If checked, indicates that you wish for group packager and card type to prepopulate in the Administration Detail for Narcotic and/or PRN prescription types.



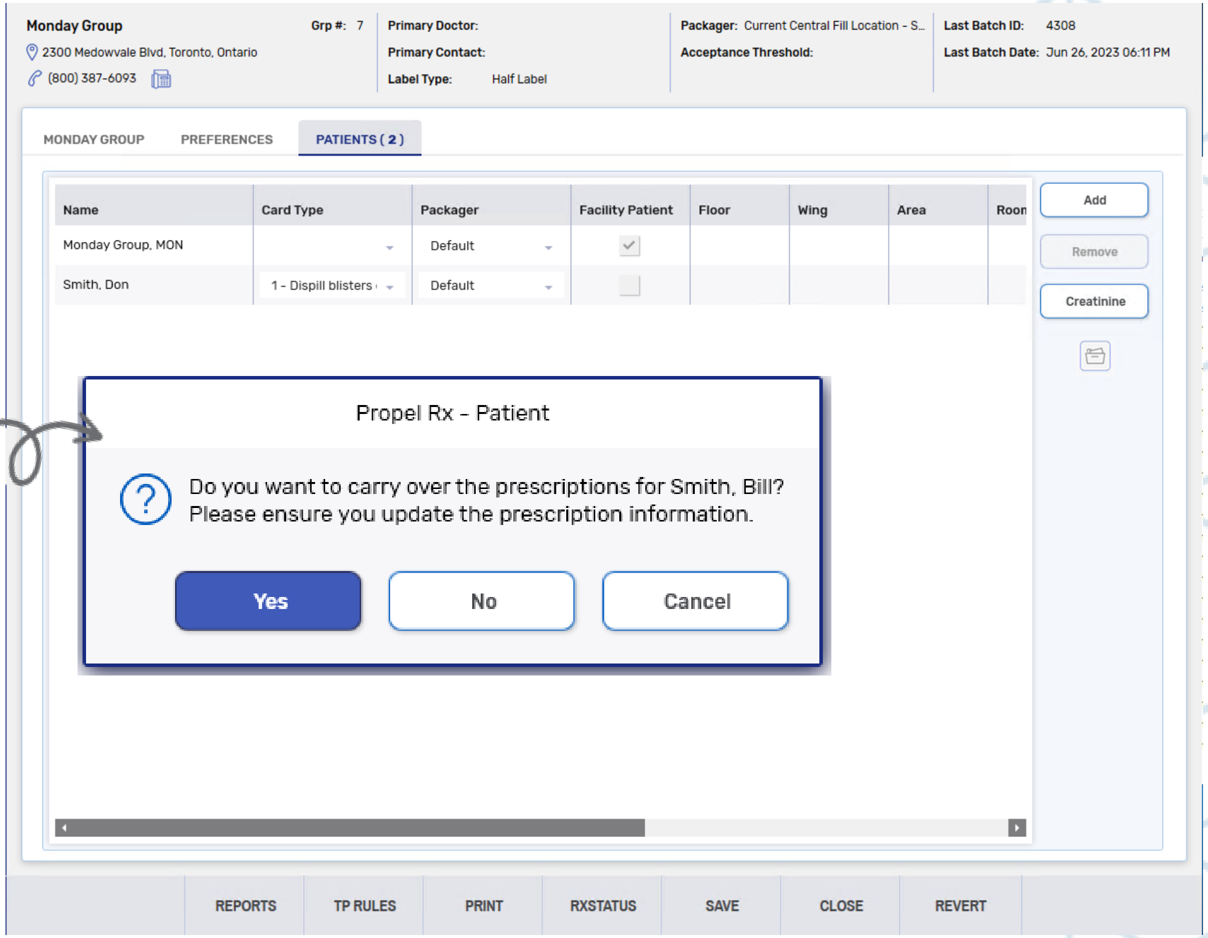
TIP: To auto-populate packager information on Refill prescriptions as well, turn ON the **Reset Packager on Refill** preference in **More** > **Pharmacy** > **Rx Detail**. For retail groups, changes to packager information in the Group Folder will not be reflected at the prescription-level regardless of the setting of this preference.

Creating a Group – Patients Tab

The Patients tab lists all the patients in the Group. Patients can be managed from this tab. Non-Retail groups will automatically generate a default Facility patient in this tab with the same name as the group upon creation.

1) **Add:** Opens Patient Search window where you can search for and select a patient you wish to add to the group. A patient can only be in one group at a time.

TIP: Be sure to select **Yes** on the carry over prescriptions prompt for the patient you added to the group so that prescriptions remain Active.



2) **Remove:** After first highlighting a patient, this button allows you to remove a patient from this group.

3) **Patient Grid:** Displays the Patient Name, Card Type, Packager, Facility Patient flag, Floor, Wing, Area, Room, Bed, Cycle, Admitted Date, Active and Carry Rx statuses of the patients in the group

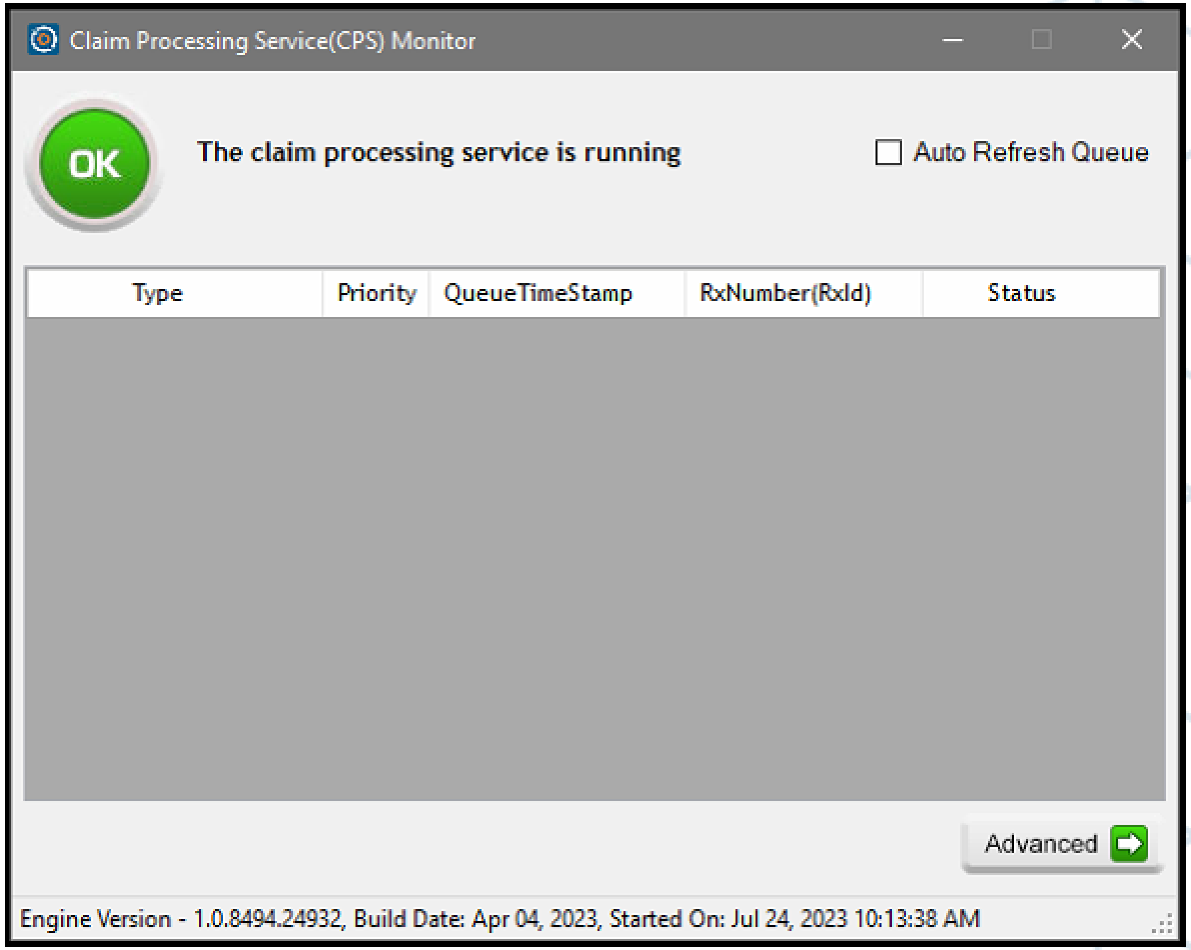
4) **Print:** Prints a list of the patients in this group

Getting Started with Batching

Batch Processing allows you to schedule multiple compliance prescriptions for background processing with minimal intervention from the pharmacy team. It's like having Propel Rx refill a batch of selected prescriptions automatically for you!

Before you start:

- Ensure the **CPS** (Claim Processing Service) is running. CPS must be kept open at the scheduled date and time of the batch for it to adjudicate.
- Ensure the prescriptions you wish to batch are appropriately flagged as **Compliance**.
- If using non-retail group types, ensure the appropriate **Group Rx Statuses** are checked on in the **Batch** column of the Group's RXSTATUS list, as seen in Creating a Group – Group Rx Status Cont'd.



Batch History Tab

Batch History tab is the main tab of **Batch Manager**. Here, you can schedule, refill, view, detail, and cancel both previous and upcoming batches.

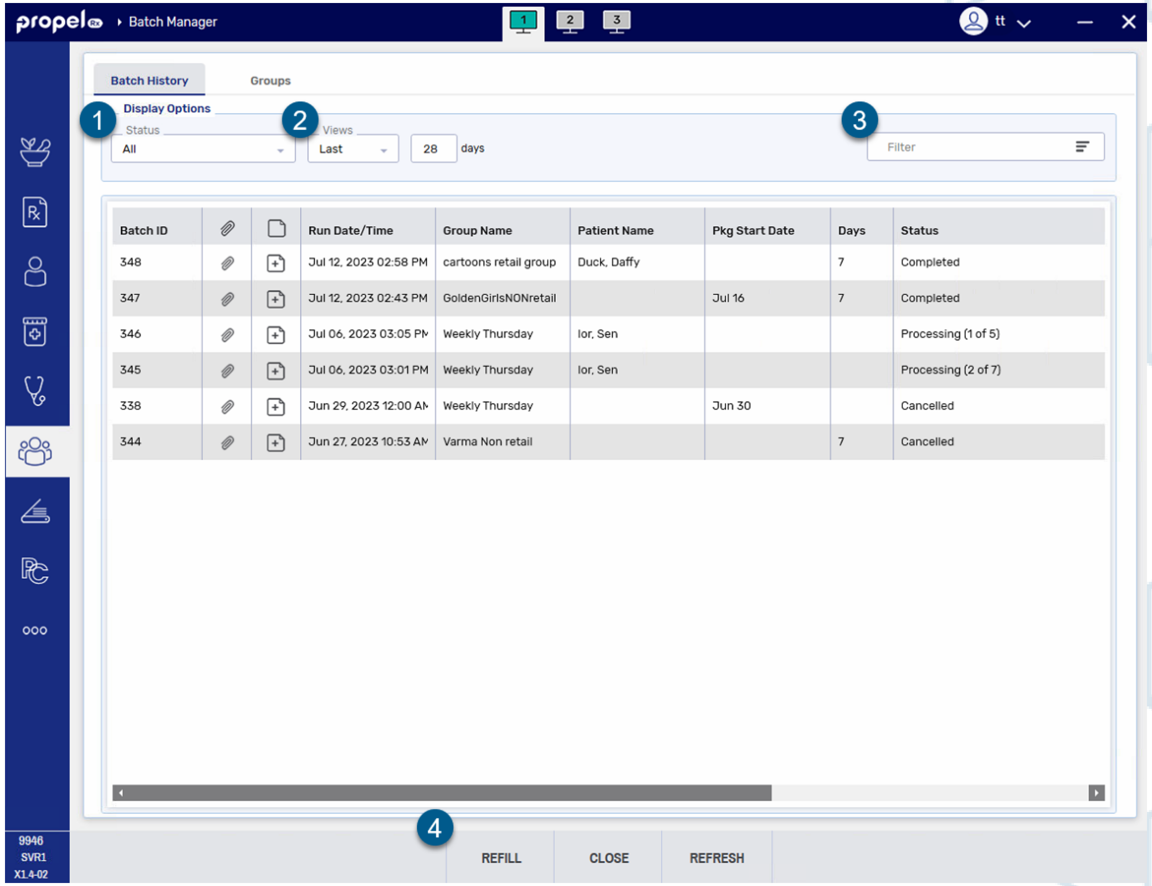
1) **Status:** Select the status of batches you wish to display.

2) **Views:** Allows you to alternate between previous and upcoming scheduled batches.

TIP: Batches scheduled until midnight on the current day will appear when the View is set as either **Last** or **Next**.

3) **Filter:** Allows you to refine the information displaying in the **Scheduled Batch Grid**.

4) **Refill:** Opens the Batch Refill window in which you may schedule a batch for a desired group.



Scheduling a Batch – Batch Refill Window

Scheduling, reviewing, and cancelling batches can be done from the Batch Manager.

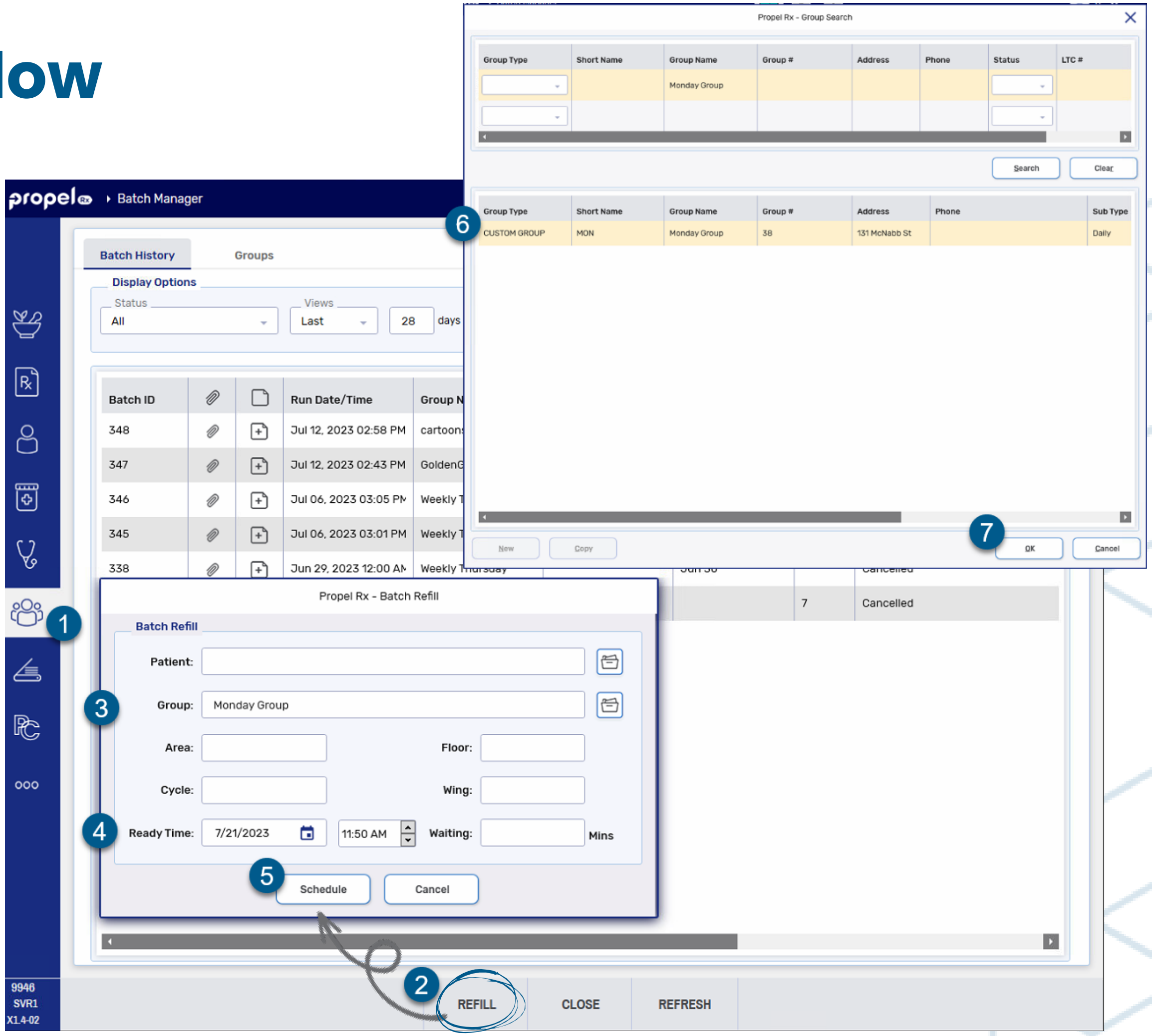
1) Navigate to **Batch Manager**.
2) From the **Batch History** tab, select **Refill**.
3) Enter the desired Group name.

   Optional: Enter any Area, Cycle, Floor, or Wing information.

4) Enter the **Ready Time** for your Workflow, if desired.

   Note: This is NOT the time the batch will be scheduled for.

5) Select **Schedule**.
6) In the **Group Search** window, select the desired group you wish to schedule the batch for.
7) Select **OK**. The **Batch Preferences** window will open.

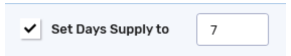


TIP: If a completed batch already exists for the desired group, highlight the batch and select **Refill**. The Group information from the highlighted batch will populate in the window.

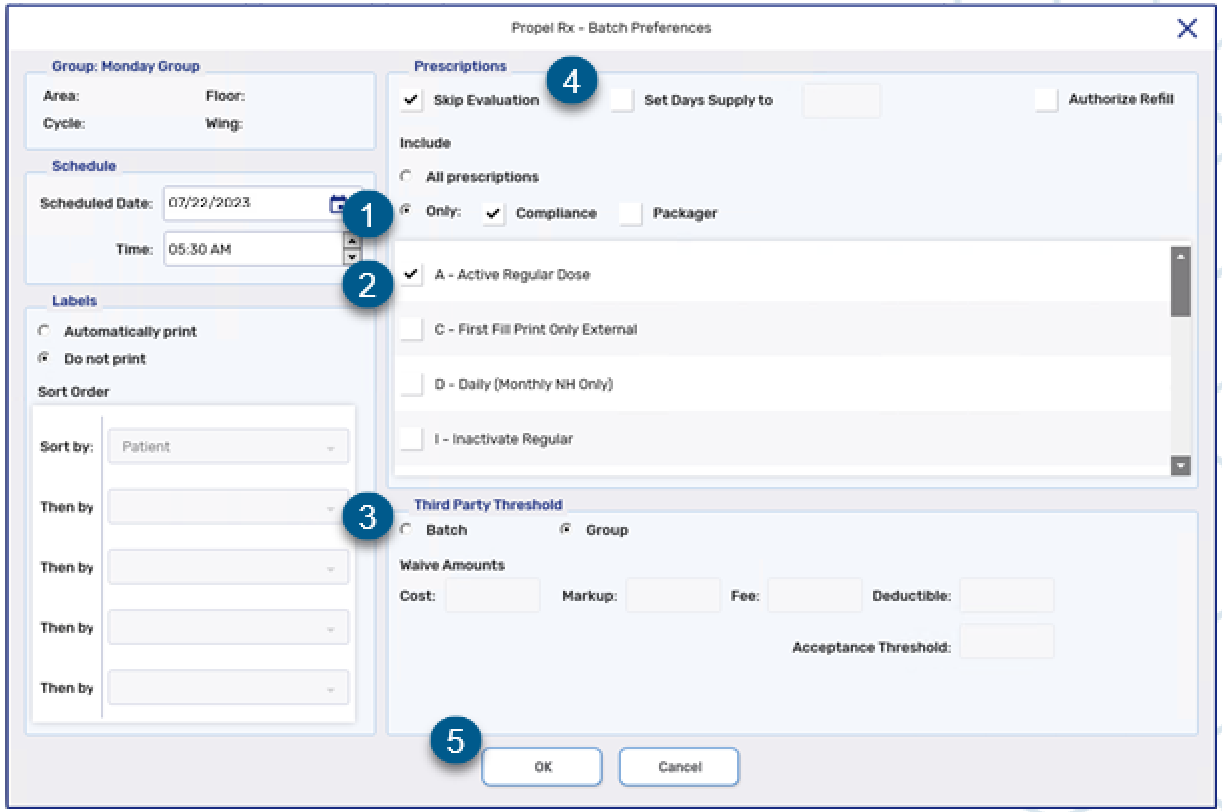
Scheduling a Batch – Batch Preferences Window

The **Batch Preferences** window will pre-populate with the selections indicated in the [**Group Preferences** tab](#) of the selected group. These preferences can be customized within this window if required.

Make the following adjustments to the Batch Preferences in this window.

1) Select the **Only** dial and **Compliance** checkbox.
2) If batching for a non-retail group, review the Group Rx Statuses you wish to include in the batch.
3) Review the **Group Waives** in the **Third Party Threshold** section. If you wish to indicate unique **Batch Waives** which differ from the waives entered in the Group's TP Threshold window, first select the **Batch** dial, then edit the desired fields accordingly.
4) *Optional*: If filling for a different Days Supply than indicated in Rx Detail for the intended prescriptions, select the Set Days Supply to checkbox, and input the desired Days Supply
   - E.g., If batch is for 7 days, this would appear as 

5) Select **OK**.
6) The **Retrieving Prescriptions** window will open and display the number of prescriptions being pulled into the batch based on the preferences selected.



WARNING! Failure to select the **Only** dial and **Compliance** checkbox before proceeding do so may result in the unintended inclusion of non-compliance prescriptions in the batch.

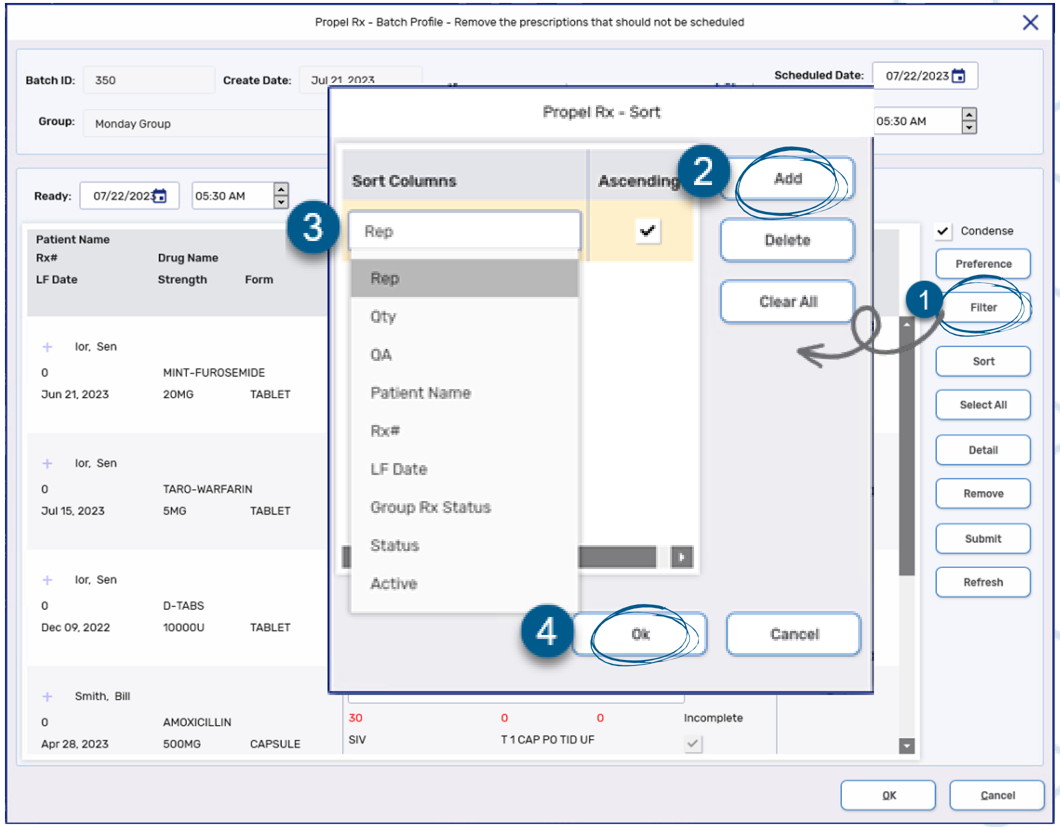
Scheduling a Batch – Sorting in the Batch Profile Window

The **Batch Profile** window will populate with prescriptions that satisfied the criteria specified in the previous (**Batch Preferences**) window.

You may wish to first sort these prescriptions by repeats remaining, in order to address any prescriptions which may require extensions for continuity of care or the generation of Authorization Requests.

1) Select **Filter**.
2) Select **Add**.
3) In the **Sort Columns** dropdown, select **Rep**. The **Ascending** checkbox should remain checked.
4) Select **OK**.

Prescriptions will now be sorted by repeats remaining, where prescriptions with 0 repeats remaining appearing at the top of the grid.

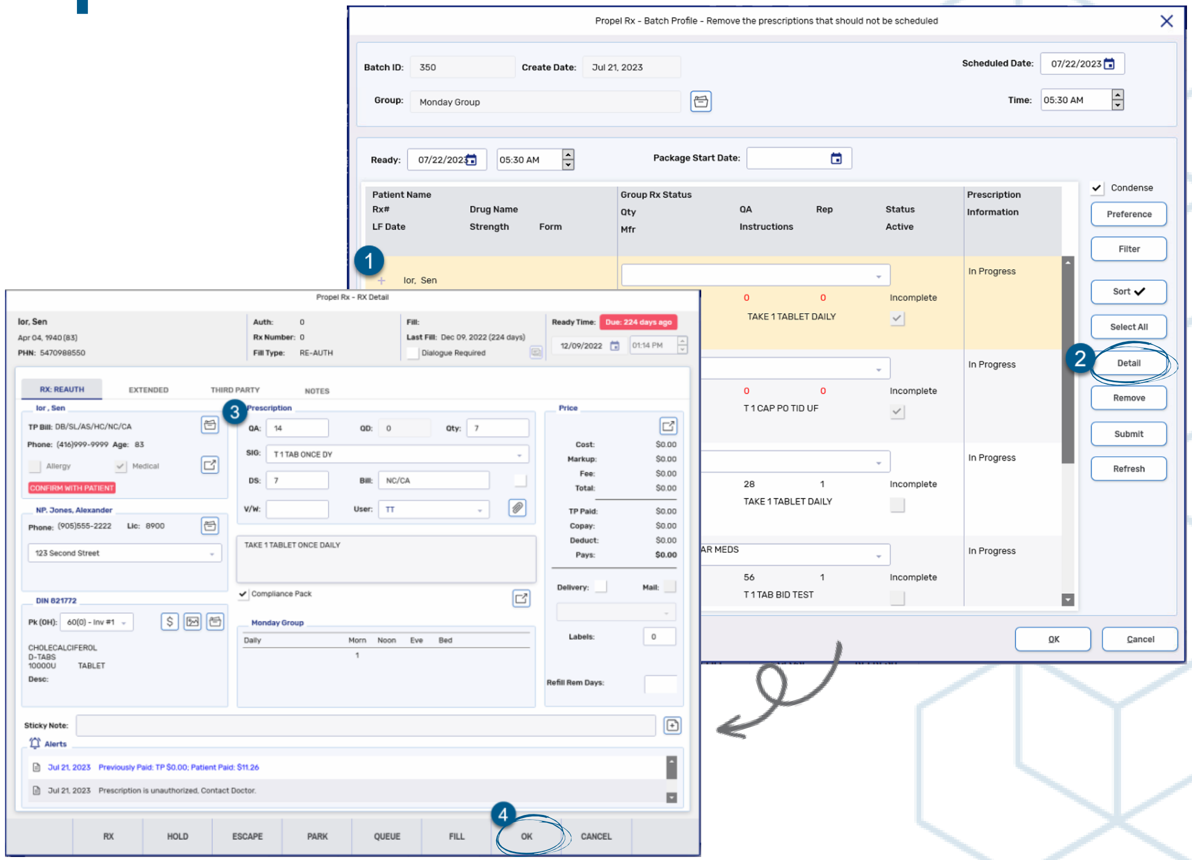


TIP: Patients with a Hospitalized patient status will not be pulled into a batch. If a patient is hospitalized, change their status accordingly rather than remove them from the group. Removing a patient from a non-retail group will cause the Group Rx Statuses to be removed from all their prescriptions.

Scheduling a Batch – Detailing a Prescription from Batch Profile Window

If you wish to edit or view a prescription in the batch for clarity, you can detail it from the Batch Profile window. This can be useful when sending an Authorization Request for a prescription.

1) Highlight the prescription you wish to edit or view.
2) Select **Detail**. Rx Detail opens
3) View or make any changes necessary to the prescription, such as changing the prescriber, updating the QA, or sending an Authorization Request.
4) Once complete, select **OK** to return the prescription to the Batch.



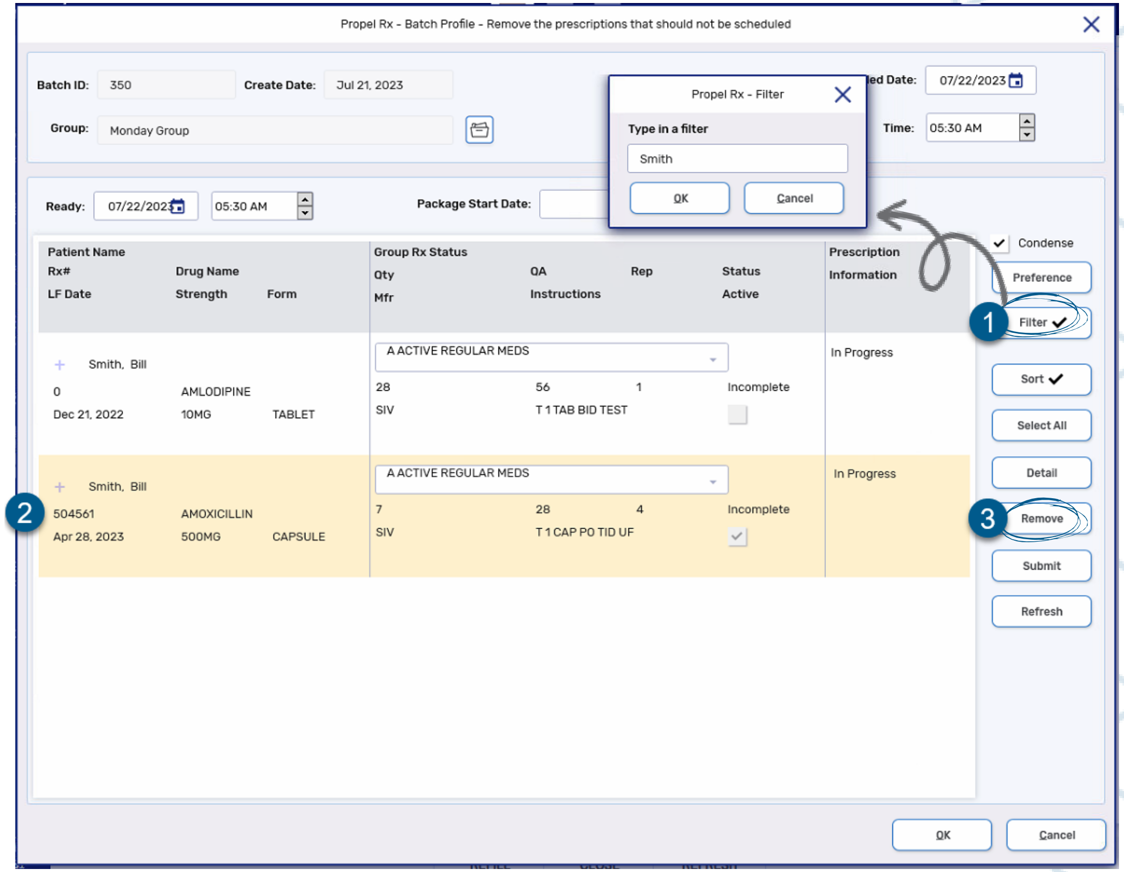
WARNING! You must select **OK** to return the prescription to the batch and have the batch preferences apply to the prescription. Selecting **FILL** will fill the prescription immediately outside of the batch.

Scheduling a Batch – Review Batched Prescriptions

Review the list of prescriptions to ensure they should be included as part of the batch.

1) Highlight the prescription(s) you wish to remove from the batch

2) Select **Remove**. Repeat this process to search for and remove any other prescriptions not required in the batch.



Scheduling a Batch –Schedule Date, Package Start Date, and Ready Time

Our final step in this window will be to review and set the Schedule Date, Package Start Date, and Ready Time.

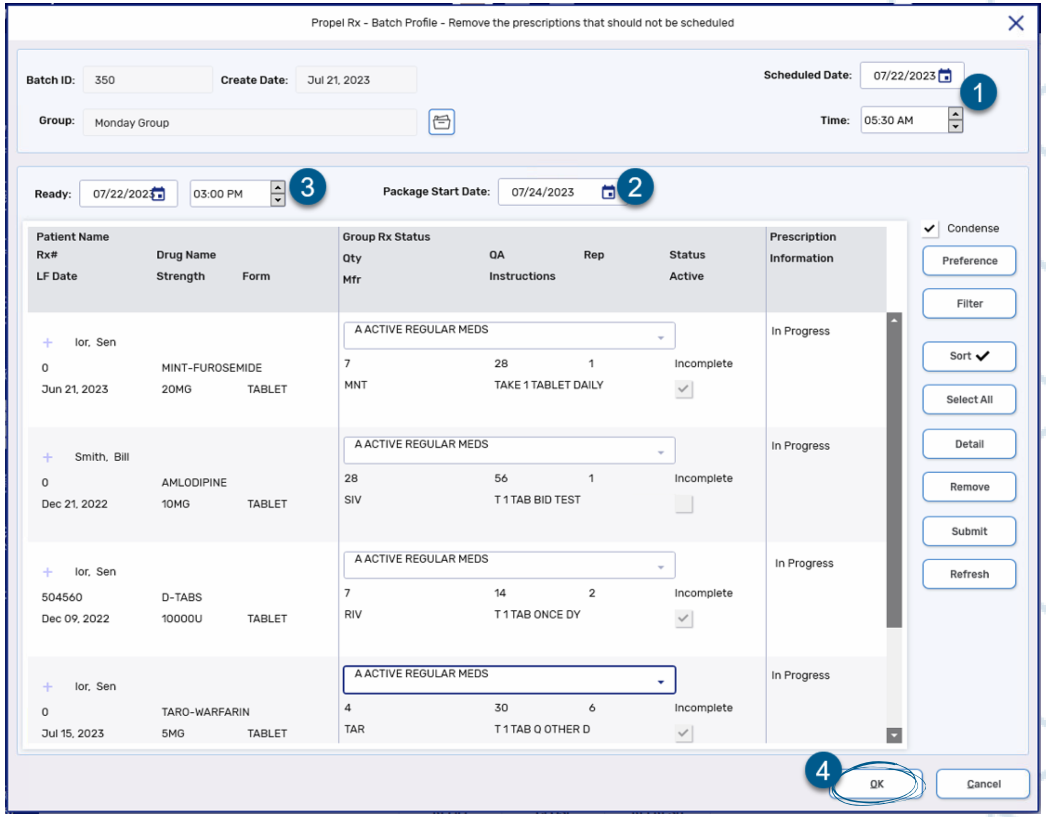
1) **Schedule Date:** The date and time at which you want the batch to run and the prescriptions to be processed.

TIP: The recommended Schedule Time is 8:00am. To avoid conflicts with adjudication or updates, batches should <u>never</u> be scheduled to run between midnight and 5:30am.

2) **Package Start Date:** The ingestion date or first date on the package for the prescription(s). This field will only appear for batches where a packager or Central Fill location is indicated.

3) **Ready Time:** (Optional) The date and time when you wish the prescriptions in this batch to appear 'due' for in your **Workbench > Workflow Tile**

4) Once the above times have been set, select OK to schedule the batch.



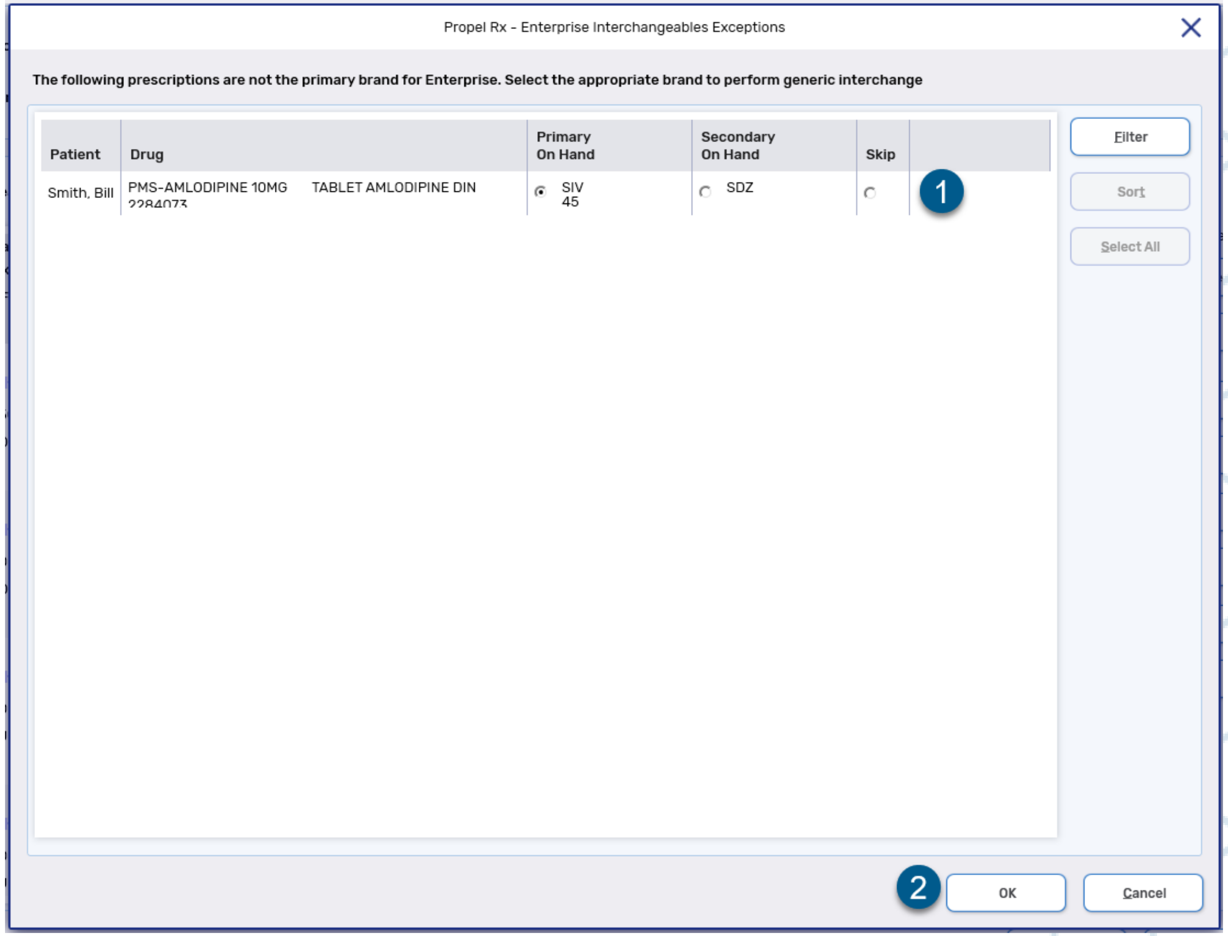
NOTE: Once the Schedule Date and Time has elapsed, the batch will begin processing. Be sure to set a time far enough in the future to allow yourself time to make any revisions!

Scheduling a Batch – Enterprise Interchangeables Exceptions

If you are an Enterprise/Formulary pharmacy, the **Enterprise Interchangeables Exceptions** window will open, displaying any prescriptions containing a drug which is not the primary Enterprise brand.

1) Select the appropriate option
   - **Primary:** Changes the drug in the prescription to the Enterprise primary brand indicated.
   - **Secondary:** Changes the drug in the prescription to the Enterprise secondary brand indicated.
   - **Skip:** Uses the brand previously dispensed for the prescription, indicated in the Drug column.
2) Select **OK**.

The prescriptions will now appear in the **Compliance Tab** of the **Data Entry** queue in the **Workflow Tile** of the **Workbench**, on the **Ready Date** indicated.

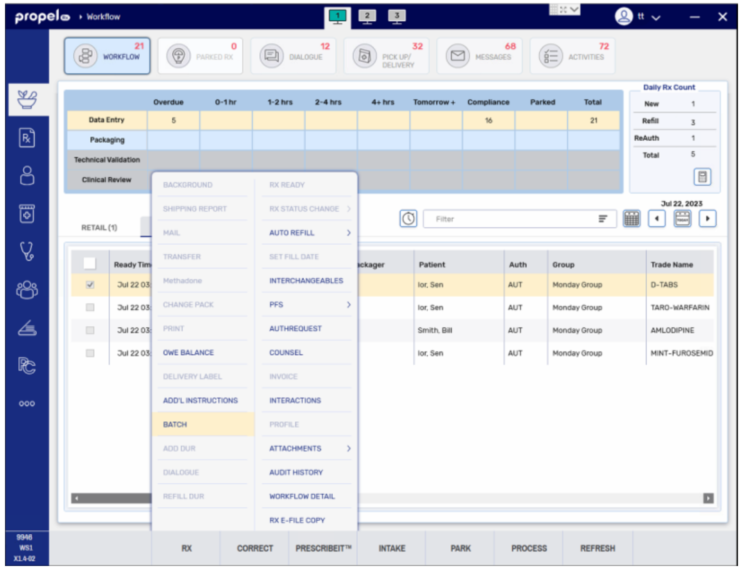


Reviewing a Scheduled Batch

You can revisit the **Batch Profile** window from the Workbench or from Batch Manager.

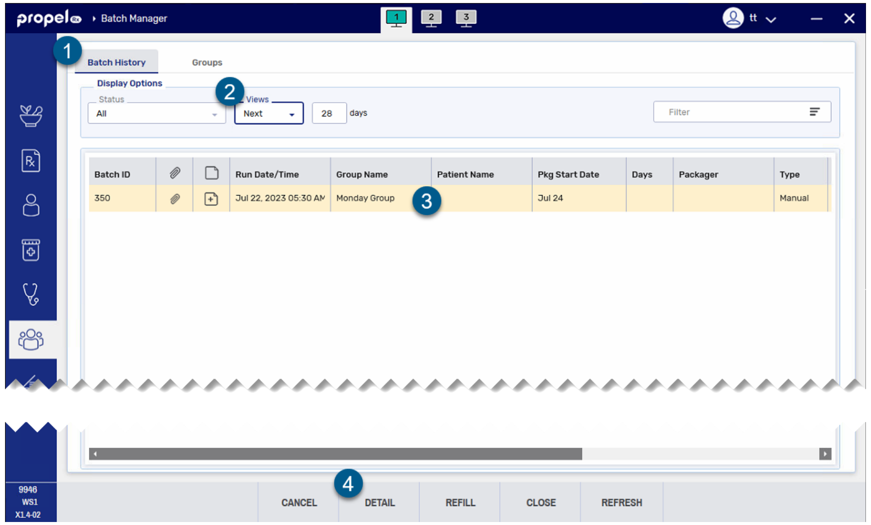
From the **Workbench:**

1) Navigate to the **Data Entry Queue** of the **Workflow Tile** and select the **Compliance tab**.
2) Highlight a prescription in the batch.
3) Select **Rx > Batch**.



From **Batch Manager:**

1) Navigate to the **Batch History Tab** of **Batch Manager**.
2) Select Last or Next from the **View** dropdown and indicate the appropriate number of days if required.
3) Highlight the desired batch.
4) Select **Detail**.

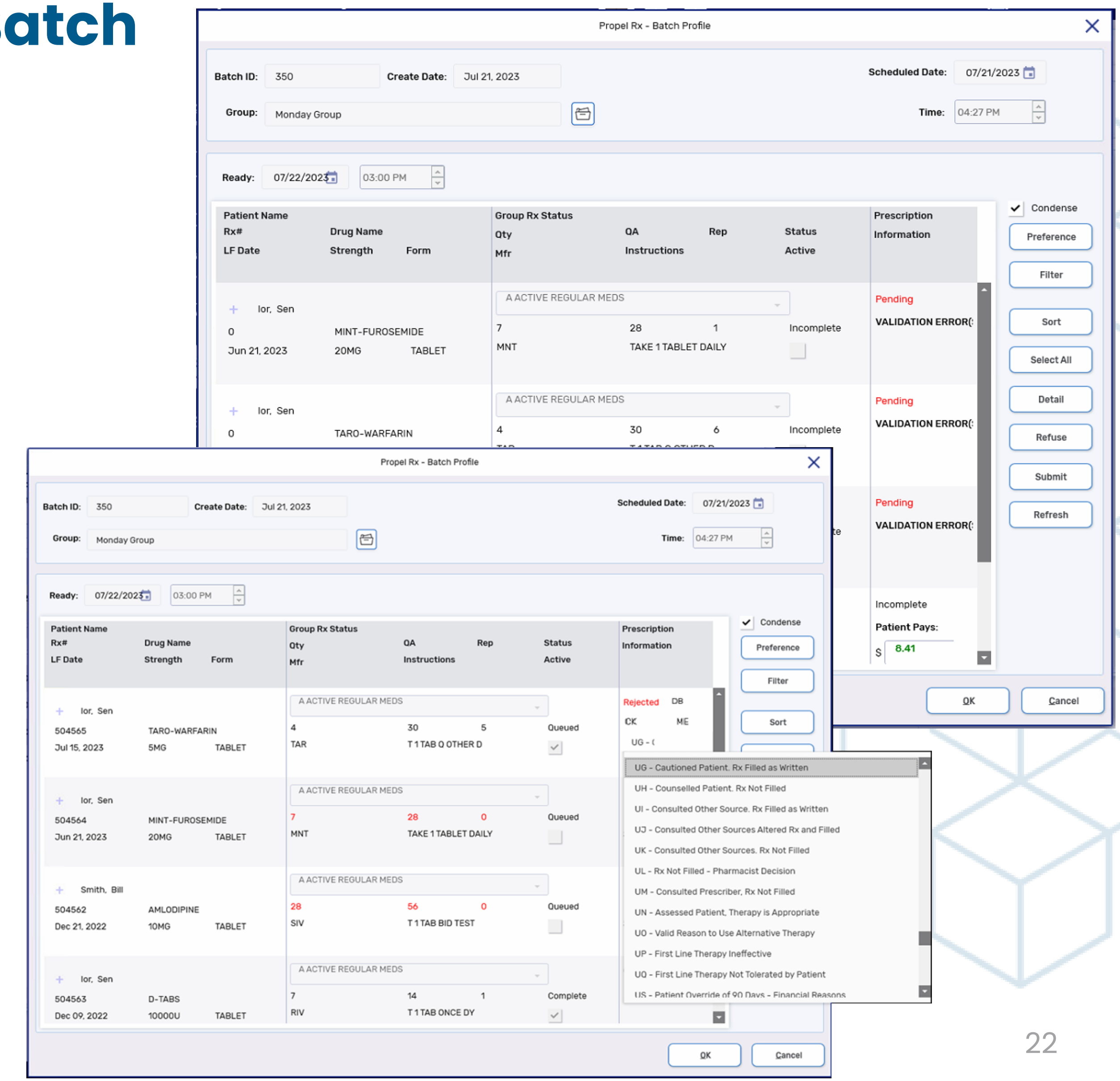


TIP: If required and the Schedule Date and Time have not yet elapsed, you can change the time from the Batch Profile window using either of the above methods!

Scheduling a Batch – Completing a Batch

Once the batch has started processing, return to the Batch Manager to view its process and complete the batch.

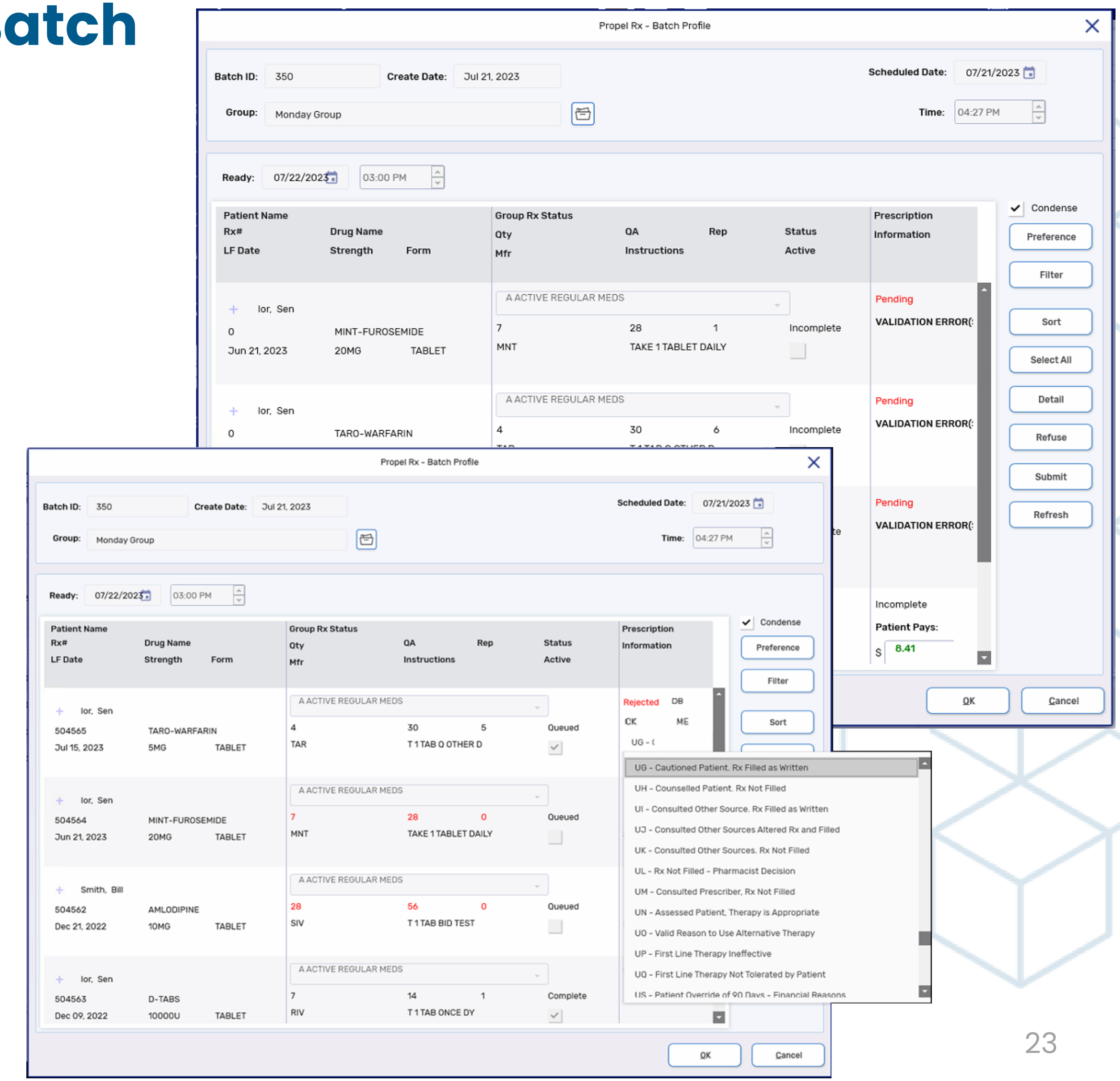
- Confirm the batch is in a Processing status. This indicates the batch is adjudicating or awaiting review.
- Highlight the Batch.
- Select **Detail**.
- Review the Status in the Prescription Information column.
  - **Rejected:** Indicates a Third Party Rejection message has been received.
    - *Resolution*: Insert the appropriate intervention code based on the [Third Party Response Codes]() if applicable.
    - If no intervention codes are possible, highlight the prescription, select **Detail**, select **Skip TP** and continue with adjudication and evaluation of the prescription.
  - **Pending:** Indicates a validation of the prescription is required.
    - *Resolution*: Highlight the prescription and select **Detail**. Address any missing information in Rx Detail. Select **OK** to return the prescription to the batch.
  - **Incomplete**, **No message**: Indicates the prescription is still in process.
  - **Incomplete, Patient Pays:** Indicates the prescription has completed adjudication and the patient pays amount exceeds the value indicated in the TP Threshold for the batch.
    - *Resolution*: Edit the Patient Pays amount if required.
  - **Complete:** Indicates the prescription is in a Complete status and no further intervention is required.
- After completing any Resolution actions indicated above, highlight the affected prescription(s) and select **Submit**.
- Select **Refresh** to see any updated Statuses in the Prescription information column. Repeat Steps 4 and 5 until all prescriptions are in a Complete status.



Scheduling a Batch – Completing a Batch

Once the batch has started processing, return to the Batch Manager to view its process and complete the batch.

- Confirm the batch is in a Processing status. This indicates the batch is adjudicating or awaiting review.
- Highlight the Batch.
- Select **Detail**.
- Review the Status in the Prescription Information column. Additional information on next slide.
- After completing any Resolution actions indicated above, highlight the affected prescription(s) and select **Submit**.
- Select **Refresh** to see any updated Statuses in the Prescription information column. Repeat Steps 4 and 5 until all prescriptions are in a Complete status.



Scheduling a Batch – Completing a Batch Cont'd

Below is a list of Prescription Information statuses and how to action them.

- **Rejected:** Indicates a Third Party Rejection message has been received.
  - *Resolution*: Insert the appropriate intervention code based on the Third Party Response Codes if applicable.
  - If no intervention codes are possible, highlight the prescription, select **Detail**, select **Skip TP** and continue with adjudication and evaluation of the prescription.
- **Pending:** Indicates a validation of the prescription is required.
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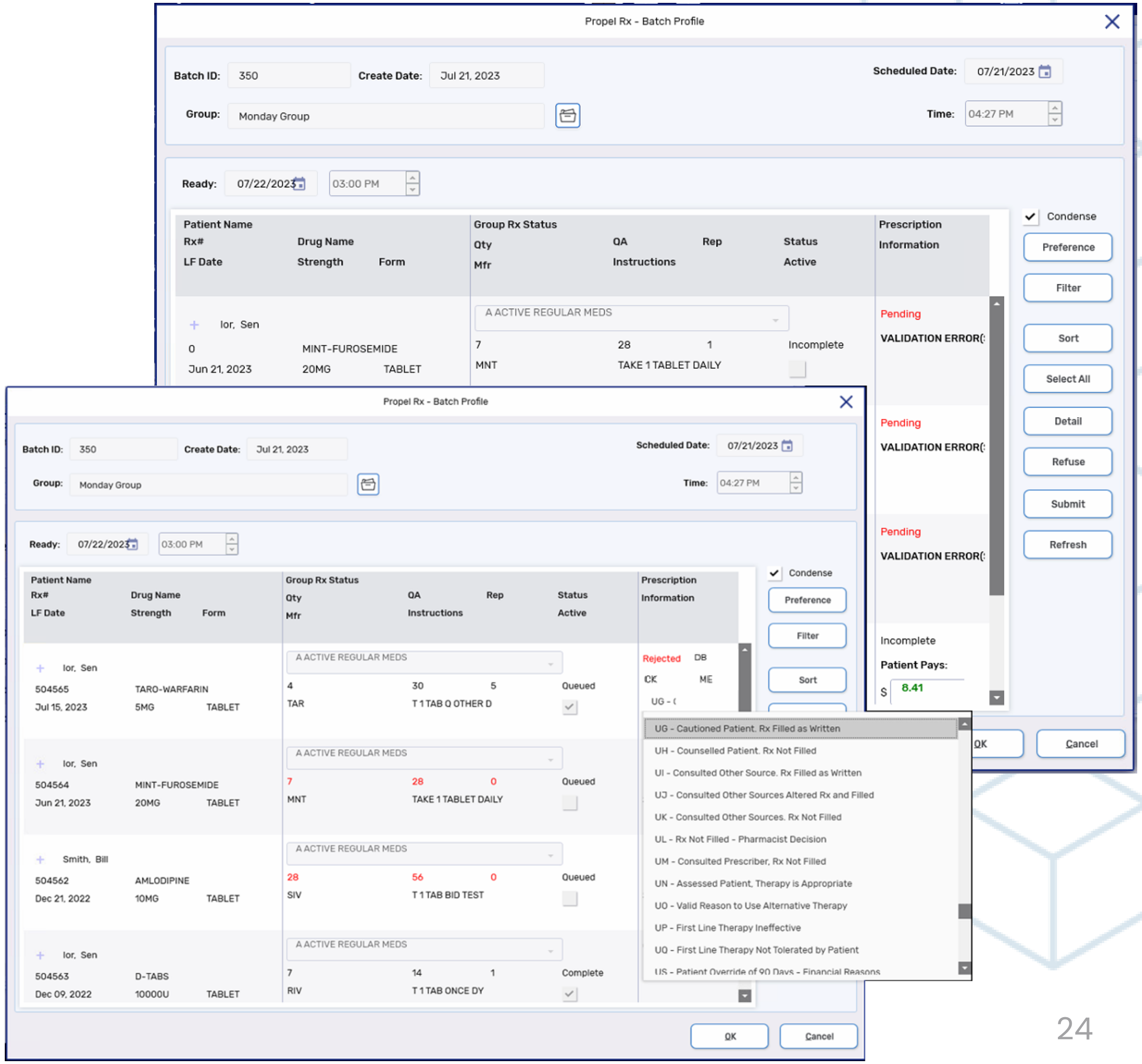
  - *Resolution*: Edit the Patient Pays amount if required.
- **Complete:** Indicates the prescription is in a Complete status and no further intervention is required.



Batch Troubleshooting

How do I change a scheduled Batch time?

a) If the Schedule Date and Time have not yet elapsed, you can reschedule the batch time from the Batch Profile window. This can be accessed by detailing the batch from **Batch Manager** or by highlighting a prescription in the batch and selecting **Rx > Batch** from the **Workflow Tile** of the **Workbench**.

What time should I schedule the batch for?

a) To avoid conflicts with adjudication or updates, batches should never be scheduled to run between midnight and 5:30am. A Schedule Time of 8:00am or later is recommended.

What group type should I use?

a) A Retail group type is recommended for most groups, including groups sending to packagers. If you require a Group Rx Status for the purposes of billing or MAR and TAR reports, you must use a Non-Retail group type for your groups.

What if prescriptions are filled outside of the batch?

a) Selecting **FILL** from **Rx Detail** on a batched prescription will fill the prescription immediately outside of the batch. Any batch or label printing preferences will not apply.

How do I cancel a batch?

a) You can cancel a batch from the **Batch History** tab of the **Batch Manager**. First, select Last or Next from the **Views** dropdown, then highlight the batch you wish to cancel and select **Cancel**. For more information, visit the Online Help.

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How can I send an authorization request for all prescriptions with no repeats remaining in the batch?

a) You can identify prescriptions which have no repeats remaining either during or after scheduling a batch.

   a) During: By sorting by **Rep** in the **Batch Profile** window. From the **Batch Profile** window, select **Sort** to open the **Sort Window**, then select **Add**. From the **Sort Columns** drop down, select **Rep**, then select **OK** to close the window. The prescriptions will now be sorted by the number of repeats remaining from lowest (no repeats remaining) to highest.

   b) After: By filtering for "NOT" on the **Workbench**. Begin by navigating to the **Compliance** tab of the **Data Entry** queue and navigate to the **Ready Time** date for the batch. Input "NOT" in the **Filter** field and select Enter on your keyboard. This will isolate the prescriptions with no repeats remaining. Next, select the checkbox in the header row to select all prescriptions in this view. Select **Rx › AuthRequest** to generate Authorization Requests for the selected prescriptions. Then select **Print** or **Fax**.

What can I use for documentation if I do not print labels for the batch?

a) The **Drug Record Book** report lists prescriptions for a patient or group of patients that were filled over a date range and can be used as the hard copy. Navigate to **More › Reports › Propel Rx Reports** to search for and locate the **Drug Record Book** report. Input the Schedule Date and Group of the batch you wish to generate the report for. Select **Preview** or **Print** to view or print the report.