PMP Manager User Guide
Version 4.1

OptimumTechnology

Copyright Statement

Table of Contents

Chapter 1: Understanding PMP Manager

Overview

Introduction

The Prescription Monitoring Program (PMP) Manager is a software system that enables you to maintain a secure, private Web site that has access to information on prescription use for drugs belonging to certain schedules. The PMP Manager functions in conjunction with the PMP Administrator functions provide you the necessary means to share information with authorized persons.

The PMP Manager facilitates the following user actions:

- Respond to requests for prescription information on patients and practitioners with reports on the same.
- Analyze prescription usage based on different analysis criteria.
- Generate reports on prescription use.
- Send alerts with relevant data to pharmacies/ practitioners.
- Upload and maintain prescription data.
- Track uploaded prescription data uploaded by pharmacies.
- Maintain pharmacy and practitioner data.
- Make corrections to DEA numbers, NDC codes and NABP numbers in prescription data.
- Maintain links between different patients in the system that the administrator considers to be the same.

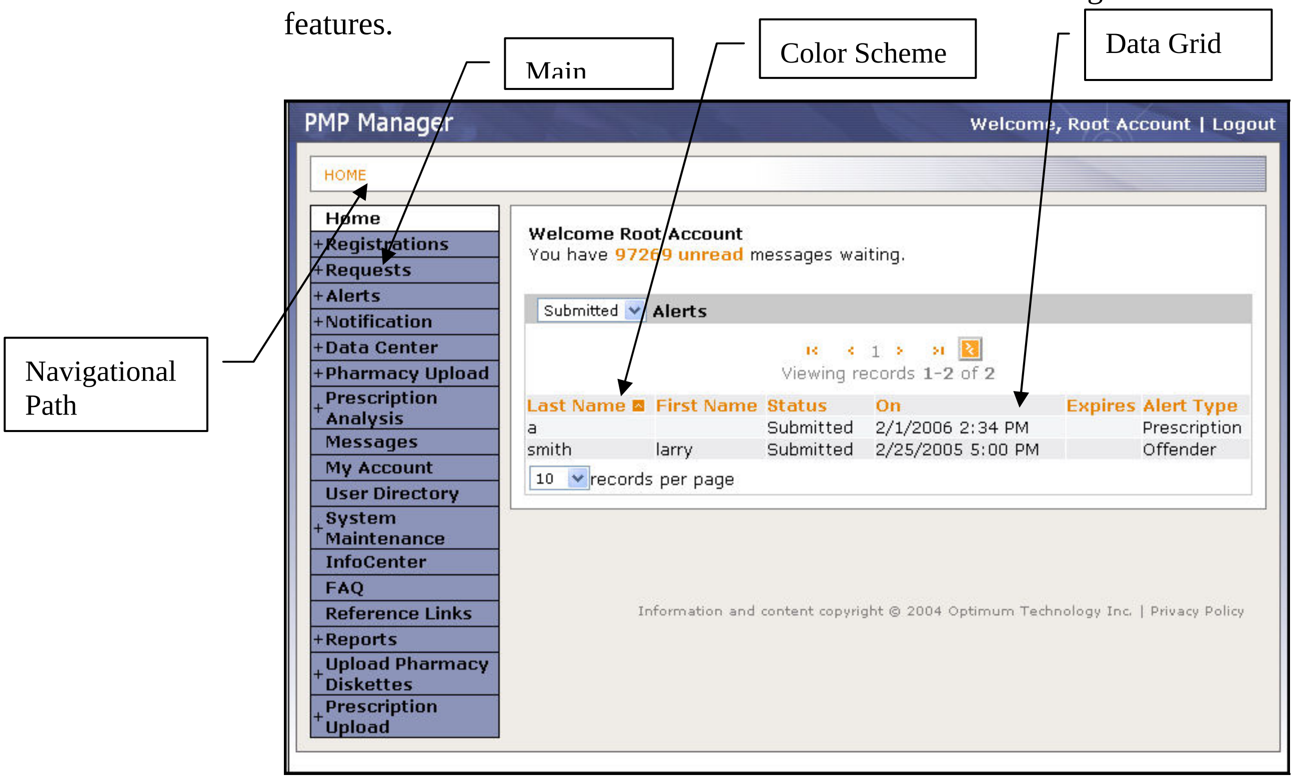
Contents

This chapter contains the following topics:

Conventions and Navigational Features

Introduction

This section describes the conventions and how to use the navigational features.



Color Scheme

Navigational and action links, buttons, and icons are represented by orange or a color you specify as part of customizations.

Main Menu

Displays the main sections. Users are assigned privileges, which grant them access rights to certain sections. Menu items with a plus sign (+) contain subordinate menu items. Click the plus sign to open the menu item's drop-down menu. When you open a drop-down menu, the plus sign becomes a minus sign (-). Click the minus sign to close the drop-down menu.

Continued on next page

Conventions and Navigational Features, Continued

Navigational Path

Links are located below the heading. A double colon (::) separates each area to reflect the hierarchy of where you are in the portal. To navigate to a particular section, click the name of the section in the navigational path.

Data Grid

Used throughout the portal to provide a list of items, such as names, agencies, jobs, etc. You can select an item from the Data Grid to view and modify its information.

Navigational Features

Icon	Features	Description
	Display next page	Displays the next page of items.
	Display last page	Displays the last page of items in the database.
	Display previous page	Displays the previous pages recently visited.
	Display first page	Displays the first page in the database.
	Refresh Data Grid	Refreshes the list of items on the Data Grid that the user is viewing.
	Delete	Permanently deletes an item from the Data Grid.
10	Records per page	Selects the number of items to be displayed on a page. For example, if 10 is selected from the record per page drop-down menu, then ten items appear on each page displayed in the Data Grid.
	Sort by column heading (users can click a column heading in the Data Grid)	Sorts the items in a column alphabetically and numerically. The up arrow icon displays items alphabetically from A-Z and numerically in ascending order. The down arrow icon displays items that are sorted alphabetically from Z-A and numerically in descending order.

Continued on next page

Conventions and Navigational Features, Continued

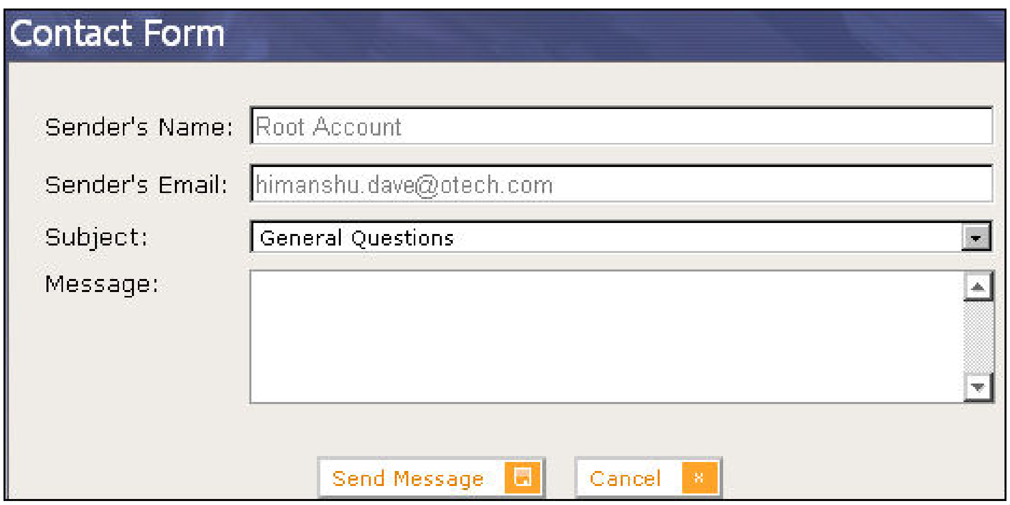
Navigational Features (continued)

Icon	Features	Description
	Select all	Selects all the entries in the grid.
	Deselect all	Deselects all the entries in the grid.
	Select all on the page	Selects all the entries on the page.
	Deselect all on the page	Deselects all the entries on the page.

Contact Us

Click the **Contact Us** link from any page within the application to contact an administrator.

Result: The Contact Form appears.



From the **Subject** drop-down menu, select an appropriate subject line. Enter your message and then click the **Send Message** button.

Logical Operators for Searching

Introduction

On all search functions, the criteria fields are linked to the values being searched on through the following logical operators:

Operator	Description
Contains	Search for records where the specified field has values within which the parameter string is present.
Like	Search for records where the specified field has a value whose sound value matches that of the parameter string.
Equals, =	Search for records where the specified field's value is equal to the value of the parameter string or parameter number.
Begins With	Search for records where the specified field's value begins with the value of the parameter string.
Ends With	Search for records where the specified field's value ends with the value of the parameter string.
>=, <=, >, <	Behavior of these operators will be same as their standard behavior in any system.

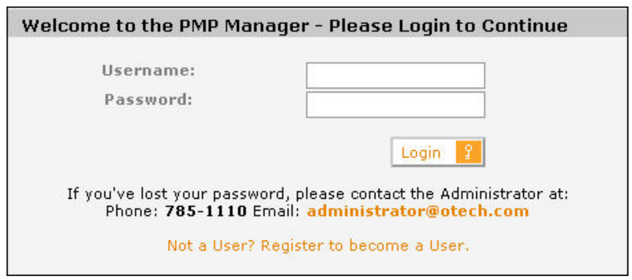
Registering to Become a User

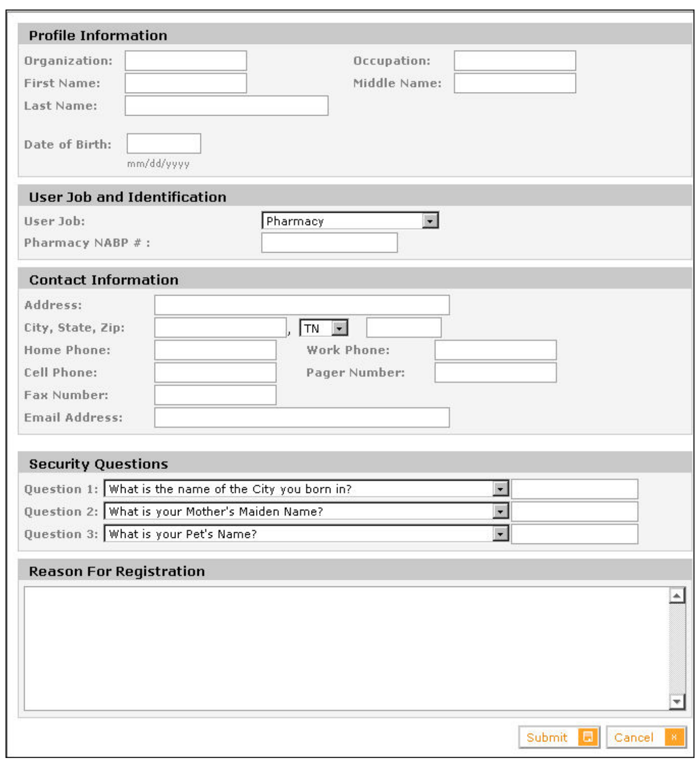
Introduction

Prior to having access to the PMP Manager or the Web Center, a user must first register to become a user. This registration is then sent to the administrator for approval or denial.

Procedure

Follow the steps in the table below to register to become a user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Not a User? Register to become a User link.


Result: The User Registration page appears.


</td></tr>
</table>

Continued on next page

Registering to Become a User, Continued

Procedure (continued)

Step	Action
2	In the **Profile** section, enter the appropriate information. **Note**: The **Last Name** field is required.
3	In the **User Job and Identification** section, from the **User Job** drop-down menu, select your User Job title. **Notes**: • The User Job field is required. • Selecting certain job title prompts the identifier field to appear. If the job title that you select prompts identifier fields to appear, these fields are required. Example: Selecting Law Enforcement as a job title would prompt the **Badge Number** field to appear.
4	In the **Contact Information** section, enter the appropriate contact information.
5	In the **Security Questions** section, select a question from each of the drop-down menus and provide the answer in the corresponding fields. **Note**: All three fields are required.
6	In the **Reason for Registration** section, enter the reason for this registration.
7	Click the **Submit** button.

Request Functions

Chapter 2: Sending Unsolicited Requests to Pharmacies and Practitioners

Overview

Introduction

You can send Unsolicited Requests to pharmacies and practitioners for a patient they have served. This informs them about prescription usage and requests additional prescription information they may have with that person.

Contents

This chapter contains the following topics:

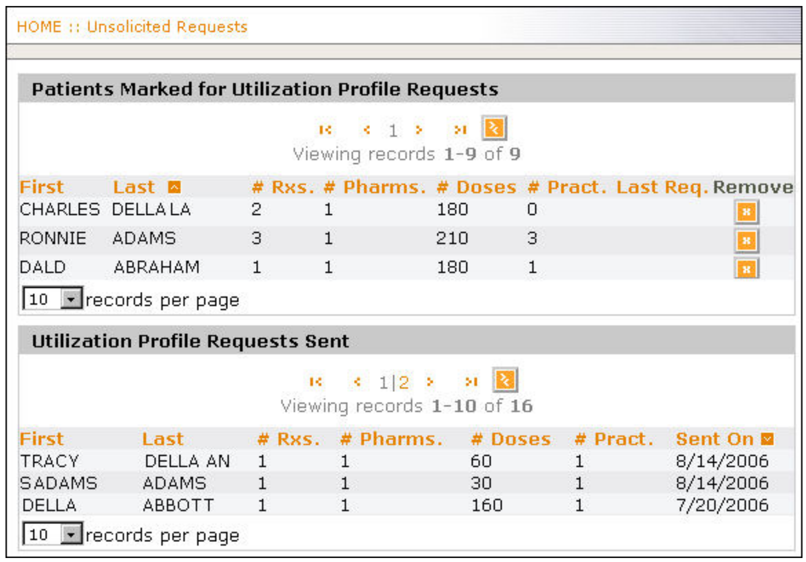
Sending an Unsolicited Request

Procedure

Follow the steps in the table below to send an unsolicited request.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Requests.</td></tr>
<tr><td>2</td><td>Click Unsolicited.

Result: The Unsolicited Request page appears.



All the patients that were marked for sending an unsolicited request subsequent to a threshold search are displayed.

Note: For a patient to be displayed on the Unsolicited Request page, you must specify so when performing a threshold search.</td></tr>
<tr><td>3</td><td>Click the patient you want to process and send an Unsolicited Request to.

Result: The Patient Utilization Report displays.</td></tr>
<tr><td>4</td><td>Click the Send Request button.

Result: The system automatically sends the request (a cover letter and the utilization report) to every practitioner and pharmacy on the report that has a specified e-mail address. For those without an e-mail address, the system prints the request on a pre-configured printer. The Submit Unsolicited Request page appears after the request is sent.</td></tr>
</table>

Submit Unsolicited Request Page Descriptions

Submit Unsolicited Request Page Descriptions

Field/Button	Description
Data Grid Column Headings	
First	The patient's first name.
Last	The patient's last name.
# Rxs.	Number of prescriptions the patient bought in the duration that was specified in the threshold search.
# Pharms.	Number of pharmacies the patient bought prescriptions from in the duration that was specified in the threshold search.
# Doses	Number of doses the patient bought in the duration that was specified in the threshold search.
# Pract.	Number of practitioners that have prescribed to the patient.
Last Req.	The month and year when an unsolicited request was last sent for this patient.
Remove button	Remove the patient from the unsolicited requests list.

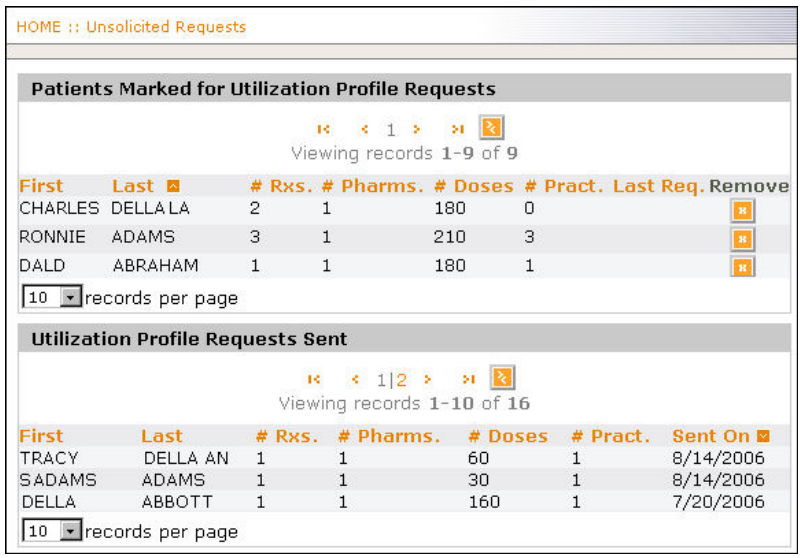
Removing a Patient from the Unsolicited Requests List

Procedure

Follow the steps in the table below to remove a patient from the unsolicited requests list.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Requests.</td></tr>
<tr><td>2</td><td>Click Unsolicited.

Result: The Unsolicited Request page appears.



All the patients that were marked for sending an unsolicited request subsequent to a threshold search are displayed.</td></tr>
<tr><td>3</td><td>Click the Remove button next to the patient that you want to remove from the Unsolicited Requests list.

Result: The patient is removed from the list.</td></tr>
</table>

Chapter 3: Processing Unread and Unfulfilled Patient Requests

Overview

Introduction

The Process Patient Request function allows you to view and process unread and unfulfilled patient requests. You can also view fulfilled or expired requests. This function allows you to respond to a request and ask the requestor to provide more information. It also allows you to attach requested files or files that may be beneficial to the requestor's needs.

Contents

This chapter contains the following topics:

Understanding Supervisor User/Delegate User Relationships

Introduction

PMP supports different levels of authority and allows for a reporting structure. This reporting structure is created when the user account is created. The reporting structure allows for an individual to be designated as a supervisor user and have delegate users assigned to them.

This structure determines how requests that are submitted by delegate users are routed through the system and whether a request requires a supervisor's approval or not.

The supervisor/delegate relationship supports three different types of users:

- Supervisor user: A user who supervisors one or more delegate users. A supervisor user is responsible for their delegate user's actions. Requests submitted by a supervisor user follow the normal request flow. Requests sent by a supervisor user's delegates can be viewed on the Request View page under the Requests Sent by Delegates section. **Note**: Use the drop-down menu to select a particular delegate user or use the default value of **All** to see requests from all of your delegate users.
- Independent user: A user who is not a supervisor user or a delegate user and does not require supervision. Requests submitted by an independent user follow the normal request flow.
- Delegate user: A user who reports to one or more supervisors and may or may not require supervision.
  - A request that is submitted by a delegate user is seen by their assigned supervisor user.
  - A request that is submitted by a delegate user who requires supervision must be either approved or denied by a supervisor user
  - A request that is submitted by a delegate user who does not require supervision is seen by the supervisor user but is not approved or denied by the supervisor user.

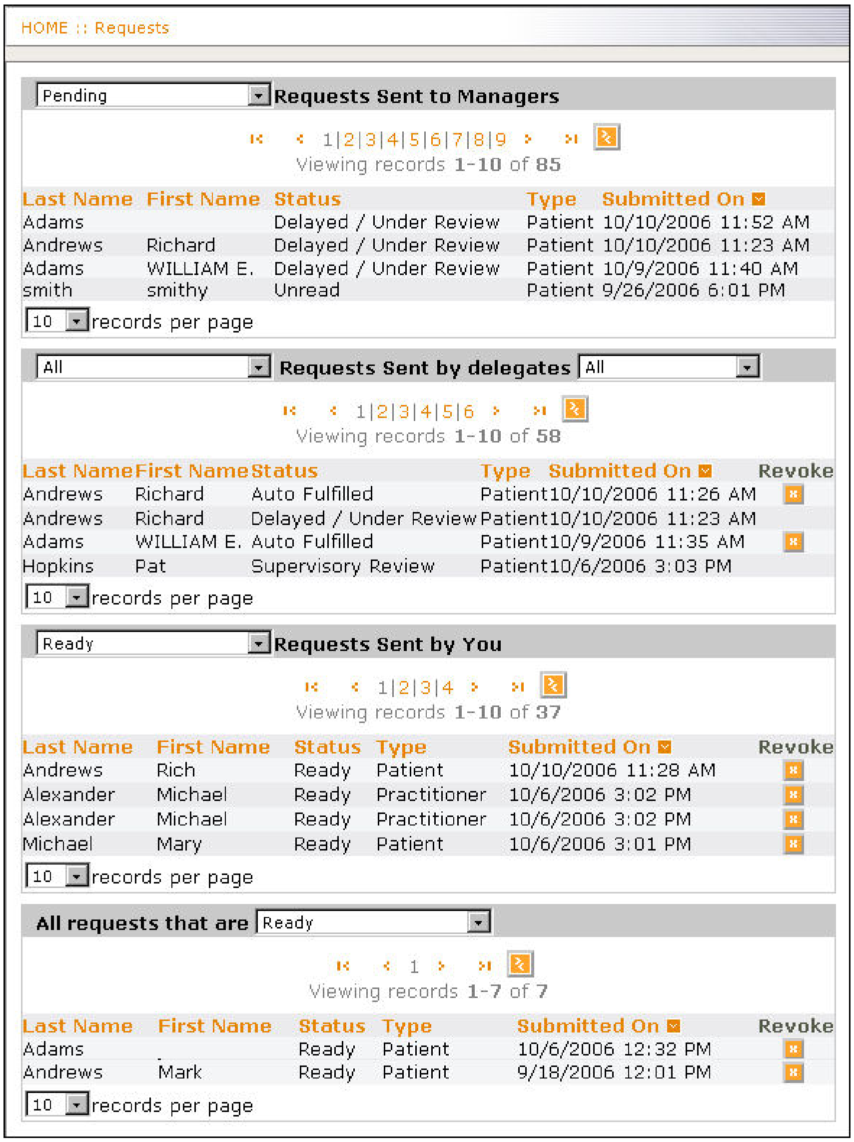
The following image is an example of a portion of the Requests View page. The **Approve** and **Deny** button appear if the request has been submitted by a delegate user.

Processing a Patient Request

Procedure

Follow the steps in the table below to process a patient request.

Step	Action
1	From the main menu, click **+Requests**.
2	Click **View**. **Result**: The Requests page appears.



HOME :: Requests

Pending — Requests Sent to Managers

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9

Viewing records 1-10 of 85

Last Name	First Name	Status	Type	Submitted On
Adams		Delayed / Under Review	Patient	10/10/2006 11:52 AM
Andrews	Richard	Delayed / Under Review	Patient	10/10/2006 11:23 AM
Adams	WILLIAM E.	Delayed / Under Review	Patient	10/9/2006 11:40 AM
smith	smithy	Unread	Patient	9/26/2006 6:01 PM

10 records per page

All — Requests Sent by delegates — All

1 | 2 | 3 | 4 | 5 | 6

Viewing records 1-10 of 58

Last Name	First Name	Status	Type	Submitted On	Revoke
Andrews	Richard	Auto Fulfilled	Patient	10/10/2006 11:26 AM	
Andrews	Richard	Delayed / Under Review	Patient	10/10/2006 11:23 AM	
Adams	WILLIAM E.	Auto Fulfilled	Patient	10/9/2006 11:35 AM	
Hopkins	Pat	Supervisory Review	Patient	10/6/2006 3:03 PM	

10 records per page

Ready — Requests Sent by You

1 | 2 | 3 | 4

Viewing records 1-10 of 37

Last Name	First Name	Status	Type	Submitted On	Revoke
Andrews	Rich	Ready	Patient	10/10/2006 11:28 AM	
Alexander	Michael	Ready	Practitioner	10/6/2006 3:02 PM	
Alexander	Michael	Ready	Practitioner	10/6/2006 3:02 PM	
Michael	Mary	Ready	Patient	10/6/2006 3:01 PM	

10 records per page

All requests that are Ready

1

Viewing records 1-7 of 7

Last Name	First Name	Status	Type	Submitted On	Revoke
Adams	.	Ready	Patient	10/6/2006 12:32 PM	
Andrews	Mark	Ready	Patient	9/18/2006 12:01 PM	

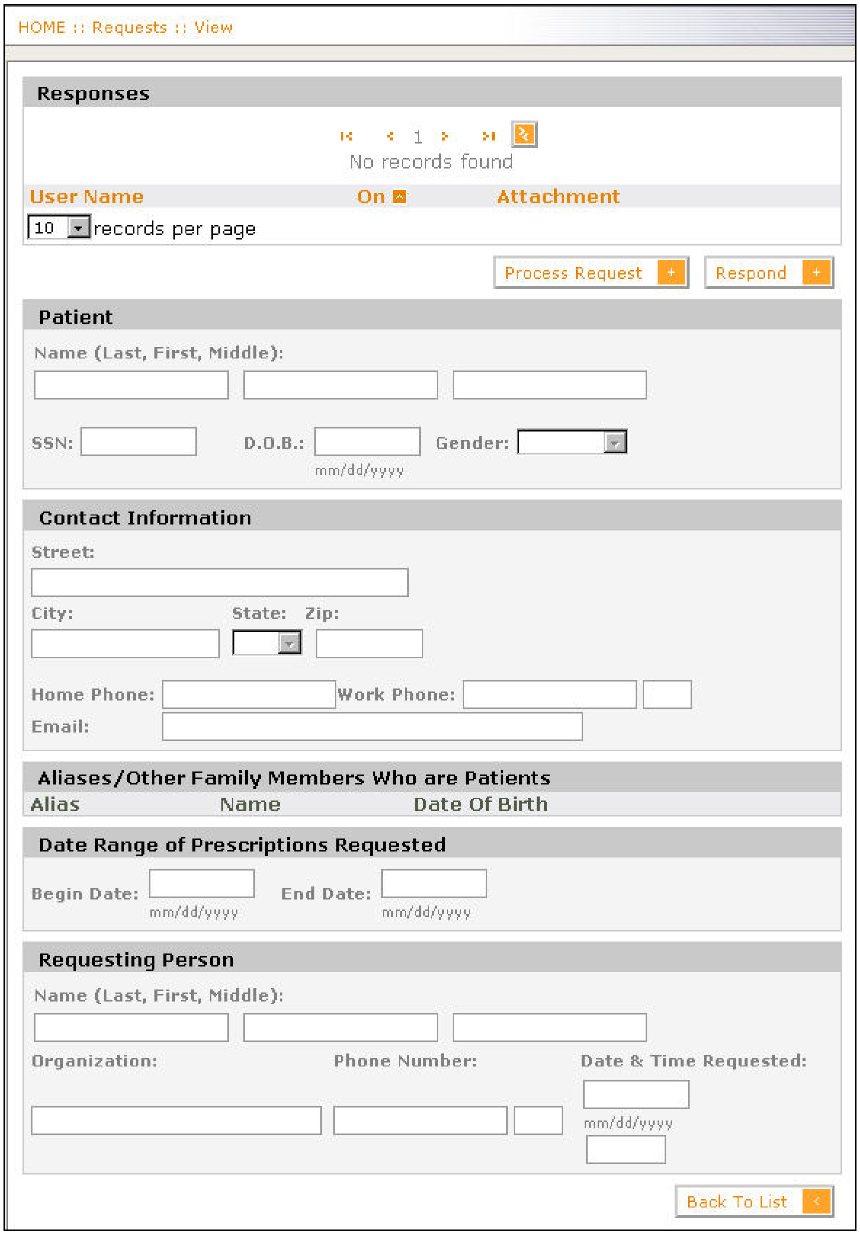
10 records per page

Continued on next page

Processing a Patient Request, Continued

Procedure (continued)

Step	Action
3	Select a patient request to view the request detail. **Result**: The View page appears.



Continued on next page

Processing a Patient Request, Continued

Procedure (continued)

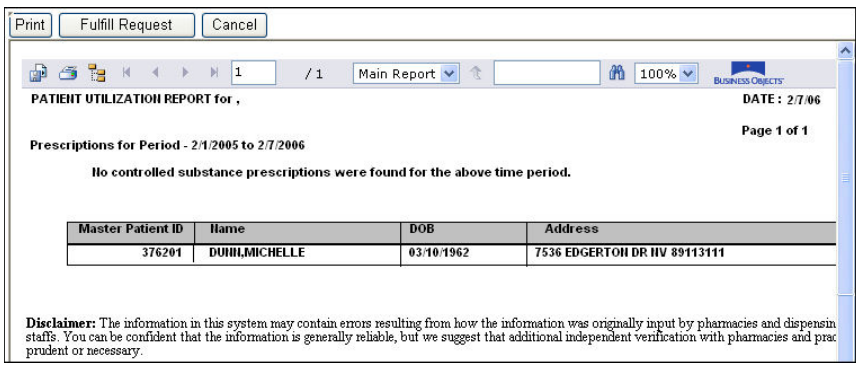
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the Process Request button.

Result: The Patient Search to Process Request page appears and displays the search criteria built from the details of the request. It executes a search and displays the results list.

You can modify the search criteria. For more information, see Patient Search function on page 106.</td></tr>
<tr><td>5</td><td>In the Search Results section, click the check boxes next to patients for whom you want to view a report.

Note: You can modify the prescription date range. The default is the date range specified in the request.</td></tr>
<tr><td>6</td><td>Click the View Report button.

Result: The Patient Utilization Report appears in the Crystal Report Viewer. The report displays all the prescriptions in the order of the fill date.


</td></tr>
<tr><td>7</td><td>Click the Fulfill Request button to fulfill the request and create a report in PDF format for the requestor to view.</td></tr>
</table>

View Page Descriptions

View Page Descriptions

Field/Button	Description
Responses	
User Name	Once the request is processed, the user identifier of the user who processed the request is displayed.
On	Once the request is processed, the date and time the request was processed on is displayed.
Attachment	Attach requested files or files that may be beneficial to the requestor's needs.
Process Request button	Process the request.
Respond button	Respond to the request. For example, if the requestor did not provide a patient's D.O.B., then you would respond to the request and ask for the patient's D.O.B.
Patient	
Name (Last, First, Middle)	The patient's name.
SSN	The patient's Social Security Number.
D.O.B	The patient's date of birth.
Gender	The patient's gender.
Contact Information	
Street	The street address where the patient practices.
City	The city where the patient practices.
State	The state where the patient practices.
Zip	The zip code where the patient practices.
Home Phone	The patient's home phone number.
Work Phone	The patient's work phone number.
Email	The patient's e-mail address.

Continued on next page

View Page Descriptions, Continued

View Page Descriptions (continued)

Field/Button	Description
Aliases/Other Family Members Who are Patients	
Alias	Aliases that the patient may use.
Name	The name of the patient's family members who visit the same practitioner.
Date of Birth	The date of birth of each family member.
Date Range of Prescriptions Requested	
Begin Date	The start date of the period for which prescription usage needs to be analyzed.
End Date	The end date of the period for which prescription usage threshold needs to be analyzed.
Requesting Person	
Name (Last, First, Middle)	The requestor's name.
Organization	The name of the requestor's organization.
Phone Number	The requestor's phone number.
Date & Time Requested	The day and time the request was submitted.

Patient Search to Process Request Page Descriptions

Patient Search to Process Request

Field/Button	Description
Search For	
Open Parentheses	Type one or more open parentheses in this field to logical group search criteria.
Element	Select the element to search on – Last Name, First Name, Date Of Birth, and Address.
Operator	Select the relational operator for the search criteria.
Value	Type the value to be used in the search criteria.
Close Parentheses	Type one or more close parentheses in this field to logical group search criteria.
Add Criterion button	Add an additional criterion.
Prescriptions	Start of date range for which prescriptions should be reported.
To	End of date range for which prescriptions should be reported.
Search Results	
<Check box>	Click the check box next to the patients you want to be included in the Patient Utilization Report.
First Name	The patient's first name.
Last Name	The patient's last name.
Date Of Birth	The patient's date of birth.
Address	The street address where the patient resides.

Chapter 4: Processing Unread and Unfulfilled Practitioner Requests

Overview

Introduction

The Process Practitioner Request function allows you to view and process unread and unfulfilled practitioner requests. You can also view fulfilled or expired requests. This function allows you to respond to a request and ask the requestor to provide more information. It also allows you to attach requested files or files that may be beneficial to the requestor's needs.

Contents

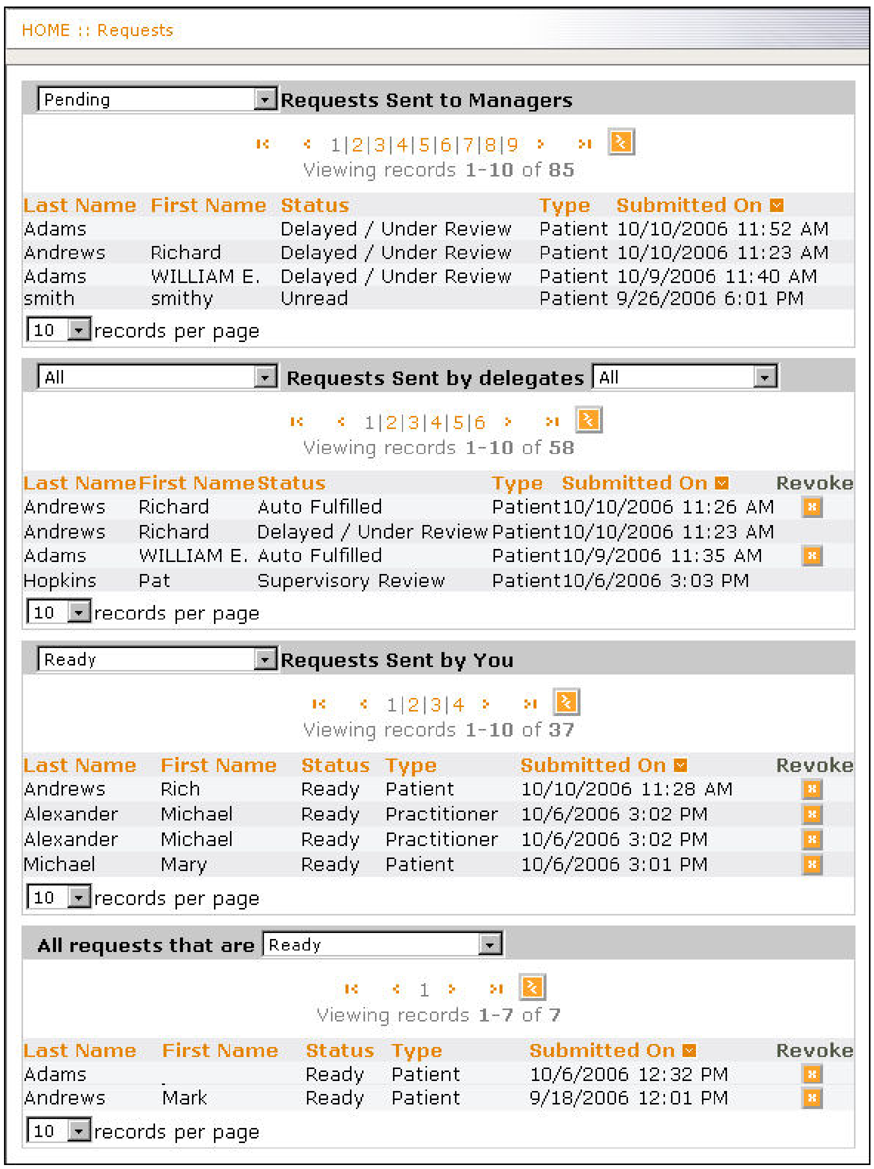
This chapter contains the following topics:

Processing a Practitioner Request

Procedure

Follow the steps in the table below to process a practitioner request.

Step	Action
1	From the main menu, click **+Requests**.
2	Click **View**. **Result**: The Requests page appears.

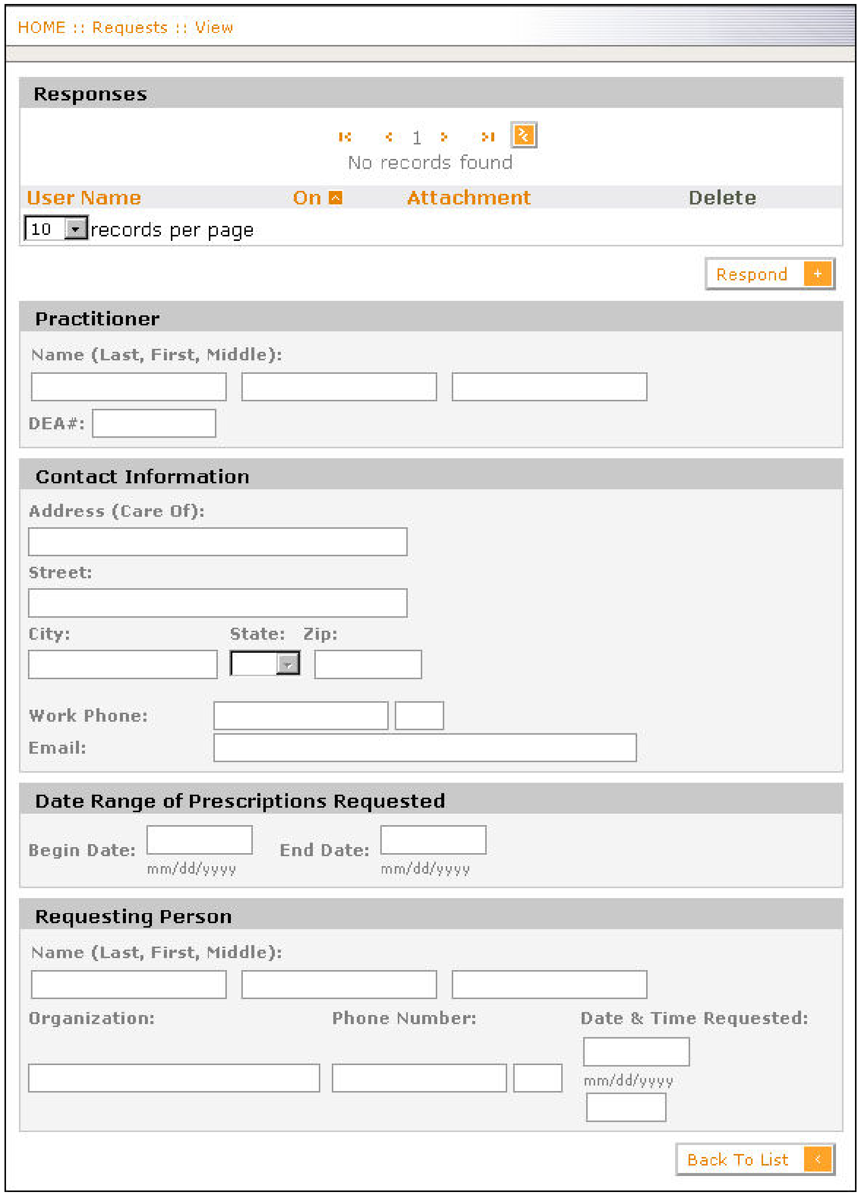


Continued on next page

Processing a Practitioner Request, Continued

Procedure (continued)

Step	Action
3	Select a practitioner to view the request detail. **Result**: The View page appears.



Continued on next page

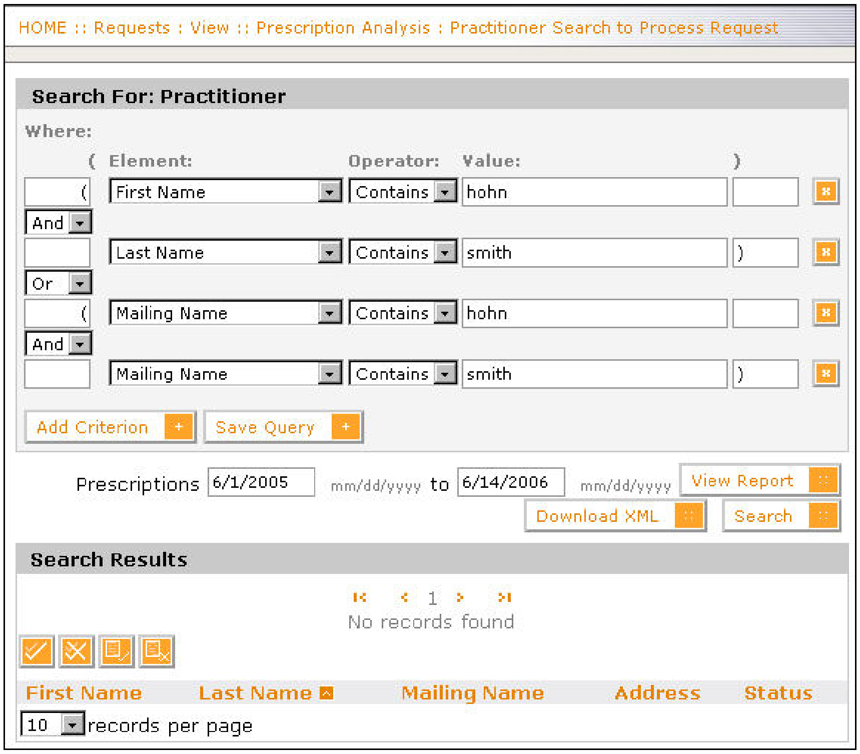
Processing a Practitioner Request, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Click the **Process Request** button.

Result: The Practitioner Search to Process Request page appears and displays the search criteria built from the details of the request. It executes a search and displays the results list.



You can modify the search criteria. For more information, see Practitioner Search function on page 111.

</td></tr>
</table>

Continued on next page

Processing a Practitioner Request, Continued

Procedure (continued)

Step	Action
5	In the Search Results section, click the check boxes next to practitioners for whom you want to view a report. **Note**: You can modify the prescription date range. The default is the date range specified in the request.
6	Click the **View Report** button. **Result**: The Practitioner Utilization Report appears in the Crystal Report Viewer. The report displays the practitioners by DEA number.
7	Click the **Fulfill Request** button to fulfill the request and create a report in PDF format for the requestor to view.

View Page Descriptions

View Page Descriptions

Field/Button	Description
Responses	
User Name	Once the request is processed the user identifier of the user who processed the request is displayed.
On	Once the request is processed the date and time the request was processed is displayed.
Attachment	Attach requested files or files that may be beneficial to the requestor's needs.
Process Request button	Process the request.
Respond button	Respond to the request. For example, if the requestor did not provide a practitioner's D.O.B., then you would respond to the request and ask for the practitioner's D.O.B.
Practitioner	
Name (Last, First, Middle)	The practitioner's name.
DEA #	The Drug Enforcement Agency number assigned to the practitioner.
Contact Information	
Address (Care of)	The care of business name where the practitioner practices.
Street	The street address where the practitioner resides.
City	The city where the practitioner resides.
State	The state where the practitioner resides.
Zip	The zip code where the practitioner resides.
Work Phone	The practitioner's work phone number.
Email	The practitioner's e-mail address.

Continued on next page

View Page Descriptions, Continued

View Page Descriptions (continued)

Field/Button	Description
Date Range of Prescriptions Requested	
Begin Date	The start date of the period for which a prescription was requested by a patient.
End Date	The end date of the period for which a prescription was requested by a patient.
Requesting Person	
Name (Last, First, Middle)	The requestor's name.
Organization	The name of the requestor's organization.
Phone Number	The requestor's phone number.
Date & Time Requested	The day and time the request was submitted.

Practitioner Search to Process Request Page Descriptions

Practitioner Search to Process Request Page Descriptions

Field/Button	Description
Search For	
Open Parentheses	Type one or more open parentheses in this field to logical group search criteria.
Element	Select the element to search on – Last Name, First Name, Date Of Birth, and Address.
Operator	Select the relational operator for the search criteria.
Value	Type the value to be used in the search criteria.
Close Parentheses	Type one or more close parentheses in this field to logical group search criteria.
Add Criterion button	Add an additional criterion.
Prescriptions	Start of date range for which prescriptions should be reported.
To	End of date range for which prescriptions should be reported.
Search Results	
<Check box>	Click the check box next to the practitioners you want to be included in the Practitioner Utilization Report.
First Name	The practitioner's first name.
Last Name	The practitioner's last name.
Date Of Birth	The practitioner's date of birth.
Address	The street address where the practitioner resides.

Data Center Functions

Chapter 5: Maintaining Pharmacy Information

Overview

Introduction

The Pharmacy Maintenance function allows you to search for pharmacies in the system and update related information.

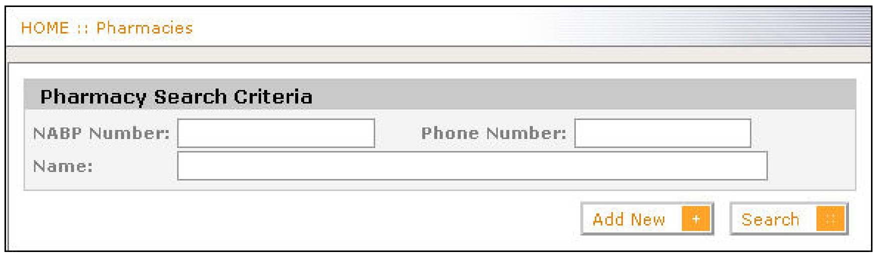
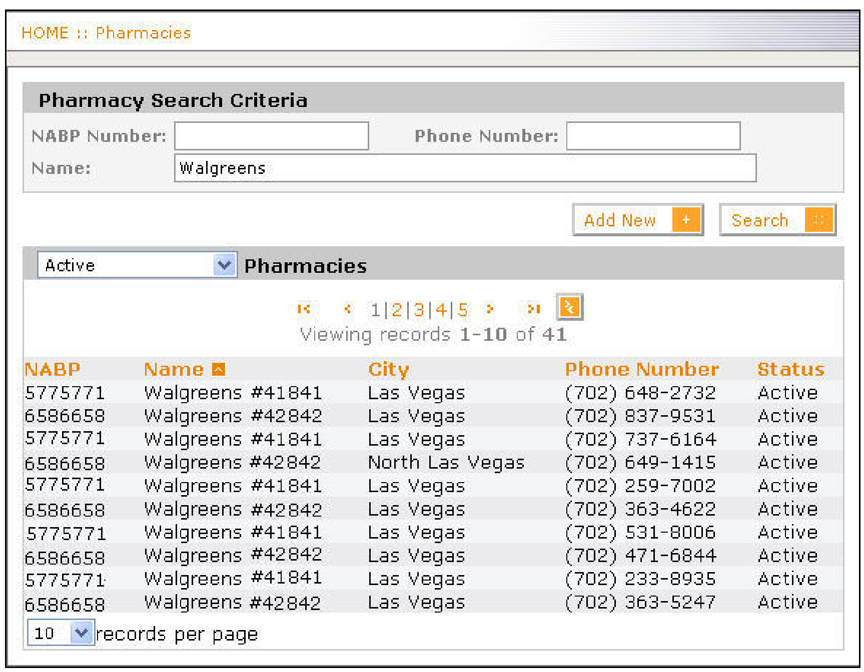
Contents

This chapter contains the following topics:

Searching for Pharmacies

Procedure

Follow the steps in the table below to search for a pharmacy.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Data Center.</td></tr>
<tr><td>2</td><td>Click Pharmacy Maintenance.
Result: The Pharmacy Search page appears.

</td></tr>
<tr><td>3</td><td>Type in the criteria you want to search, and then click the Search button.
Result: A grid containing all the pharmacies displays.

</td></tr>
</table>

Pharmacy Search Page Descriptions

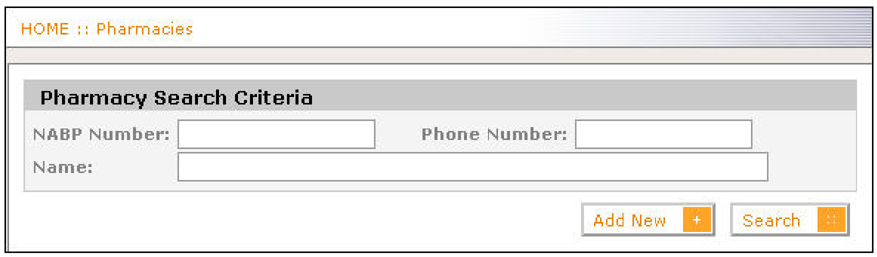
Pharmacy Search Page Descriptions

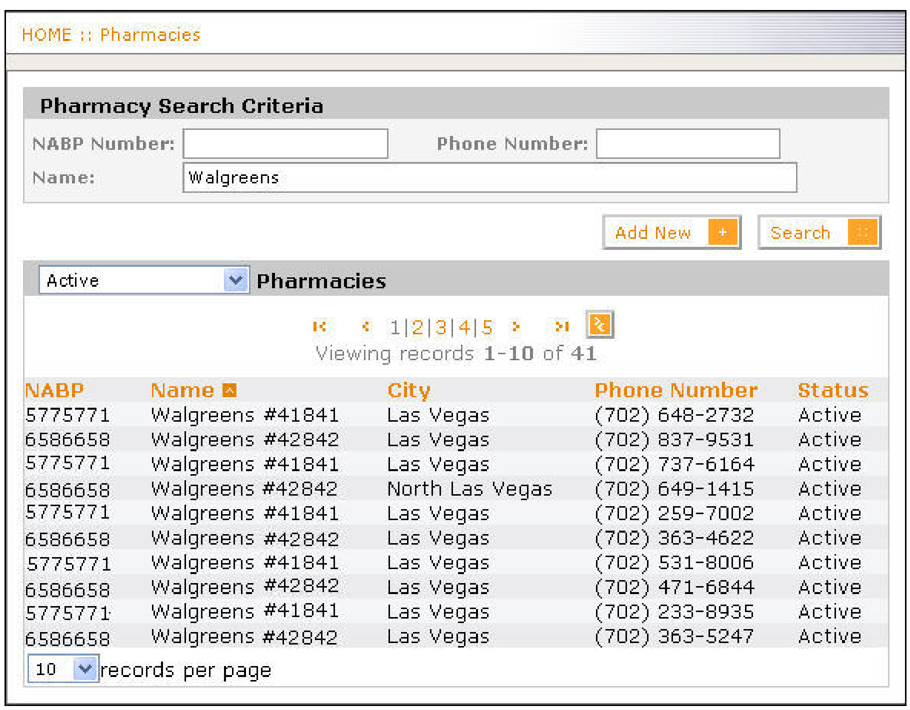
Field/Button	Description
NABP Number	Search for a pharmacy with a specific NABP Number.
Phone Number	Search by phone number.
Name	Type the name of the pharmacy or part of the pharmacy name that you want to search for. The system performs a 'contains' search based on the pharmacy name.
Result Data Grid Description	
Pharmacy Status	In the data grid heading, use the drop-down box to select and view the pharmacies with a particular status.
Data Grid Column Headings	
NABP	The National Association of Boards of Pharmacy number assigned to this pharmacy.
Name	The name of the pharmacy.
City	The city where the pharmacy is located.
Phone Number	The telephone number for the pharmacy.
Status	The status of the pharmacy – active, closed, etc.

Viewing Details of a Pharmacy

Procedure

Follow the steps in the table below to view details of a pharmacy.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Data Center.</td></tr>
<tr><td>2</td><td>Click Pharmacy Maintenance.
Result: The Pharmacy Search page appears.


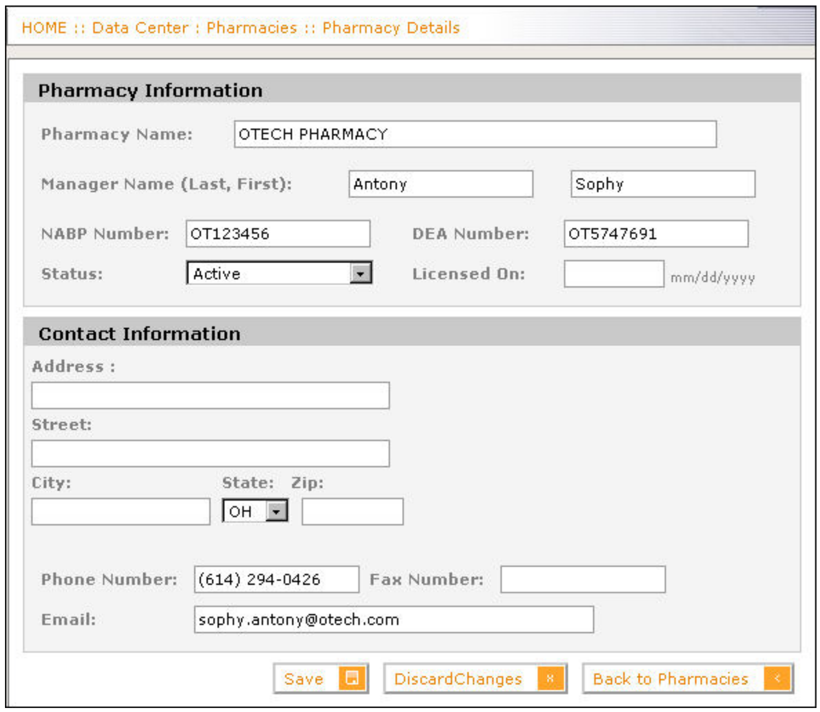
</td></tr>
<tr><td>3</td><td>Type in the criteria you want to search, and then click the Search button.
Result: A grid containing all the pharmacies displays.


</td></tr>
</table>

Continued on next page

Viewing Details of a Pharmacy, Continued

Procedure (continued)

Step	Action
4	Select the pharmacy whose data you wish to view. **Result**: The Pharmacy Details page appears containing the details for that pharmacy. 

Pharmacy Details Page Descriptions

Pharmacy Details Page Descriptions

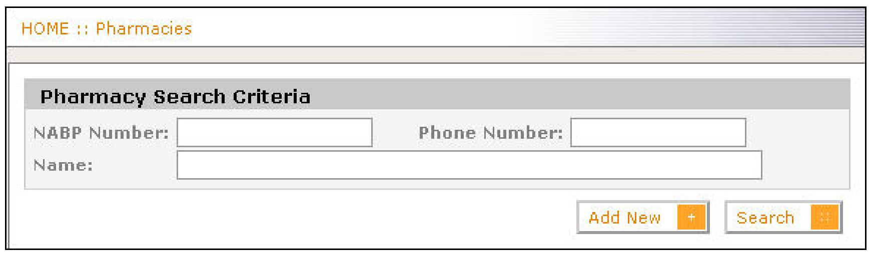
Field/Button	Description
Name	The name of the pharmacy.
Manager Name	The pharmacy manager’s last name and first name.
NABP Number	The National Association of Boards of Pharmacy number assigned to this pharmacy.
DEA Number	The Drug Enforcement Administration registration number of the pharmacy.
Status	The status of the pharmacy – active, closed, etc.
Licensed On	The date the pharmacy was licensed.
Contact Information	
Address	Any care of line information for the pharmacy.
Street	The street address of the pharmacy.
City	The city where the pharmacy is located.
State	The state where the pharmacy is located.
Zip	The zip code where the pharmacy is located.
Phone Number	The telephone number for the pharmacy.
Fax Number	The fax number for the pharmacy.
Email	The e-mail for the pharmacy.

Updating Pharmacy Information

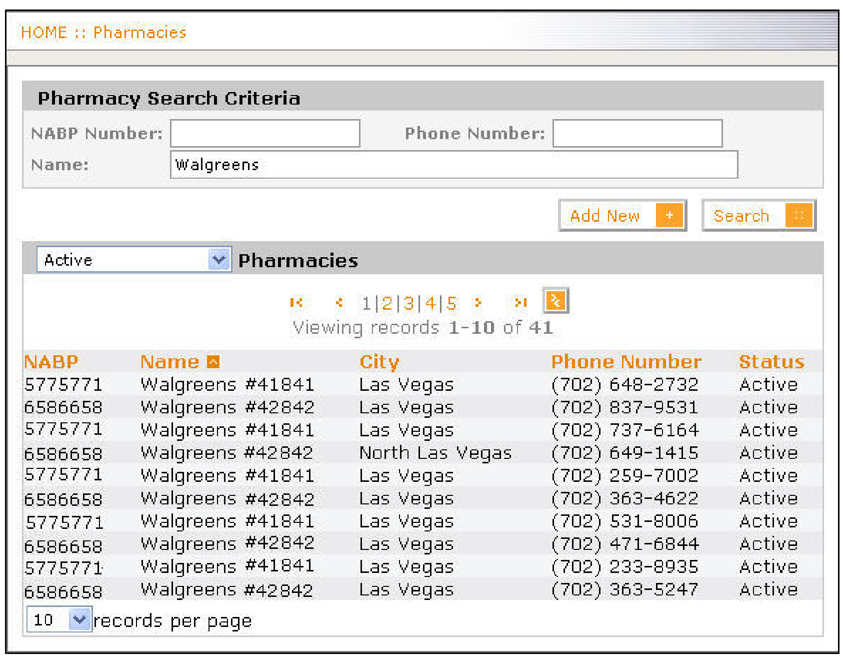
Procedure

Follow the steps in the table below to update pharmacy information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Data Center.</td></tr>
<tr><td>2</td><td>Click Pharmacy Maintenance.
Result: The Pharmacy Search page appears.



</td></tr>
<tr><td>3</td><td>Type in the criteria you want to search, and then click the Search button.
Result: A grid containing all the pharmacies appears.



</td></tr>
</table>

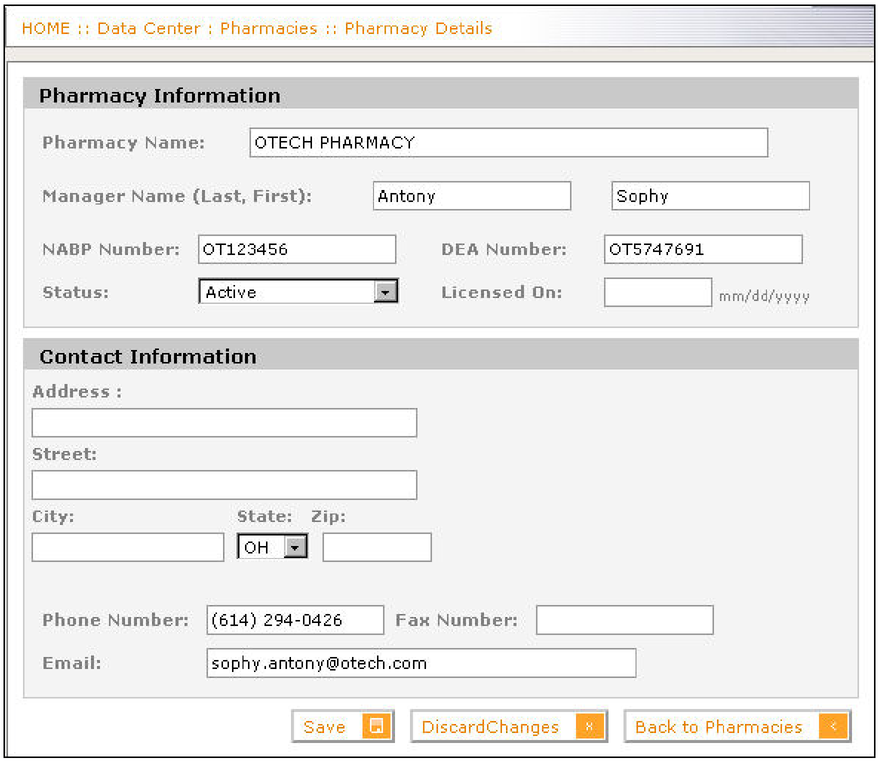
Continued on next page

Updating Pharmacy Information, Continued

Procedure
(continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select the pharmacy whose data you wish to view.

Result: The Pharmacy Details page appears containing the details for that pharmacy.



</td></tr>
<tr><td>5</td><td>Modify the appropriate information, and then click the Save button.</td></tr>
</table>

Chapter 6: Maintaining Practitioner Information

Overview

Introduction

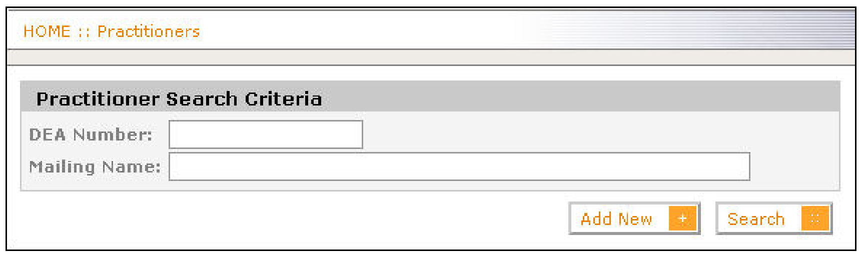
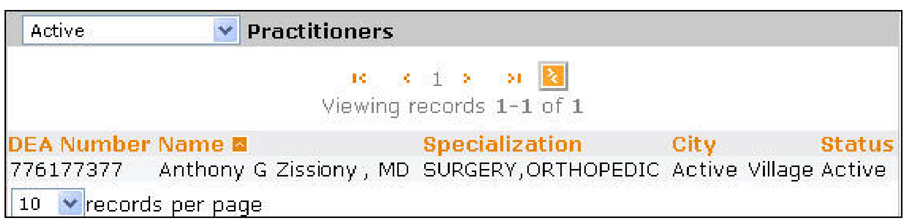
The Practitioner Maintenance function allows you to search for practitioners and update their information.

Contents

This chapter contains the following topics:

Searching for Practitioners

Procedure Follow the steps in the table below to search for practitioners.

Step	Action
1	From the main menu, click **+Data Center.**
2	Click **Practitioner Maintenance**. **Result**: The Practitioner Search page appears.  **Note**: The DEA number and the practitioner username are the same.
3	Type the criteria you want to search, and then click the **Search** button. **Result**: A grid appears containing the practitioner data. 

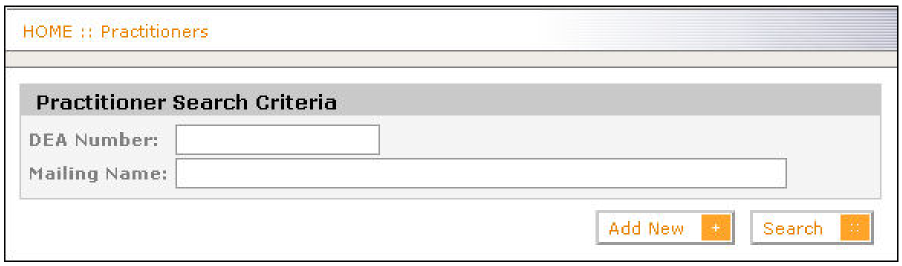
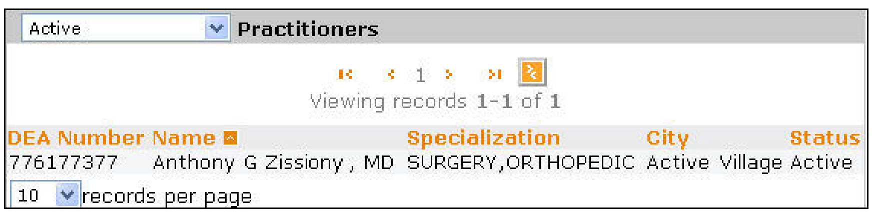
Practitioner Search Page Descriptions

Practitioner Search Page Descriptions

Field/Button	Description
DEA Number	Type in the DEA number if you would like to search for a practitioner with a specific DEA Number.
Mailing Name	Type in the mailing name or part of the mailing name that you want to search. The system performs a ‘contains’ search based on the practitioner’s mailing address.
Result Data Grid Description	
Practitioner Status	In the data grid heading, use the drop-down box to select and view practitioners with a particular status.
Data Grid Column Headings	
DEA Number	The Drug Enforcement Administration registration number of the practitioner.
Name	The mailing name of the practitioner (including the title).
Specialization	The practitioner’s specialization.
City	The city where the practitioner resides.
Status	The status of the practitioner – active, inactive, etc.

Viewing Details of a Practitioner

Procedure Follow the steps in the table below to view the details of a practitioner.

Step	Action
1	From the main menu, click **+Data Center**.
2	Click **Practitioner Maintenance**. **Result**: The Practitioner Search page appears. 
3	Type the criteria you want to search, and then click the **Search** button. **Result**: A grid appears containing the practitioner data. 

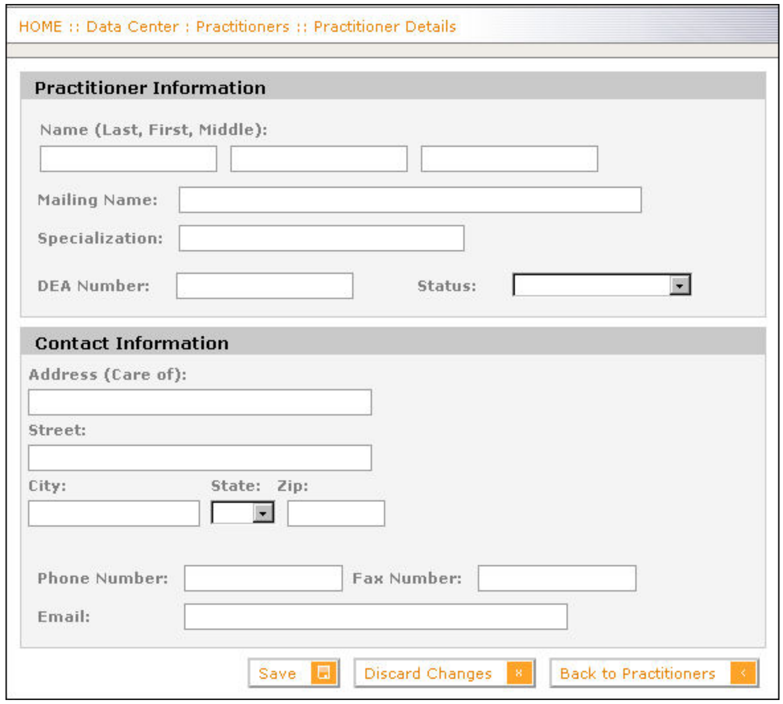
Continued on next page

Viewing Details of a Practitioner, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th><th></th></tr>
<tr><td>4</td><td>
Select the practitioner you want to view.

Result: The Practitioner Details page appears the practitioner details.



</td><td></td></tr>
</table>

Practitioner Details Page Descriptions

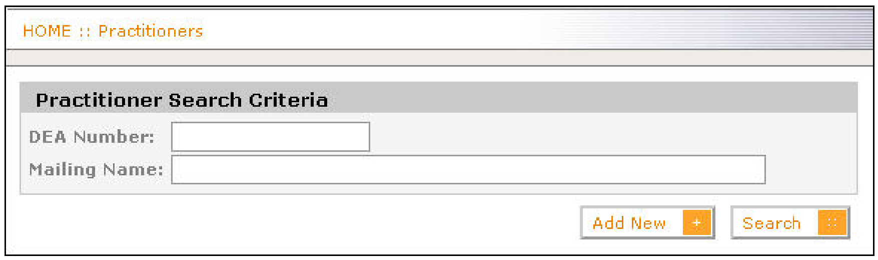
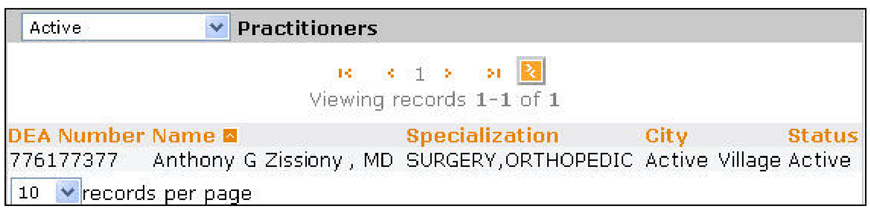
Practitioner Details Page Descriptions

Field/Button	Description
Name	The practitioner's last, first, and middle name.
Mailing Name	The mailing name of the practitioner including the title.
Specialization	The practitioner's specialization.
DEA Number	The Drug Enforcement Administration registration number of the practitioner.
Status	The status of the practitioner – active, inactive, etc.
Contact Information	
Address	Any care of line information for the practitioner.
Street	The street address of the practitioner.
City	The city where the practitioner resides.
State	The state where the practitioner resides.
Zip	The zip code where the practitioner resides.
Phone Number	The practitioner's telephone number.
Fax Number	The practitioner's fax number.
Email	The practitioner's e-mail address.

Updating Practitioner Information

Procedure

Follow the steps in the table below to update the practitioner information.

Step	Action
1	From the main menu, click **+Data Center**.
2	Click **Practitioner Maintenance**. **Result**: The Practitioner Search page appears. 
3	Type the criteria you want to search, and then click the **Search** button. **Result**: A grid appears containing the practitioner data. 

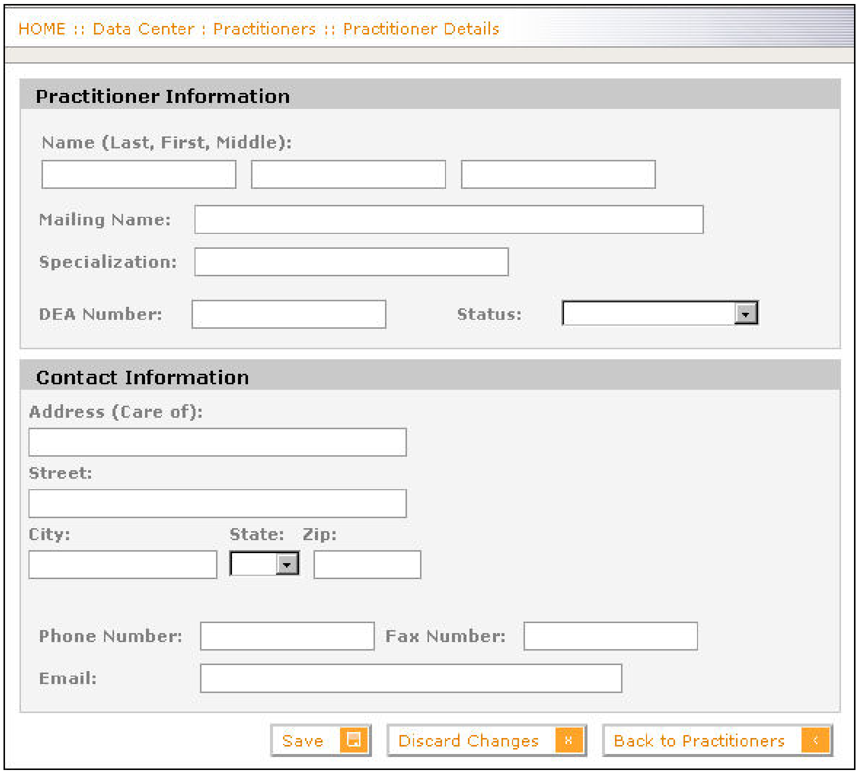
Continued on next page

Updating Practitioner Information, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select the practitioner you want to view.

Result: The Practitioner Details page appears the practitioner details.



</td></tr>
<tr><td>5</td><td>Modify the information, and then click the **Save** the button.</td></tr>
</table>

Chapter 7: Group Maintenance

Overview

Introduction

The Group Maintenance function is used to manually group patients/practitioners who may have multiple record instances. Multiple record instances can occur for many different reasons.

- Information is incorrectly entered in the original system. Ex. Misspelled or mistyped.
- The patient/practitioner has had a name changed or uses more than one name. Ex. Jen to Jennifer.

Manual grouping/ungrouping can take place in the following scenarios:

1. Group – Group
2. Group – Record
    - Grouping – Link a record in one group to an already existing group
    - Ungrouping – Unlink a record from an existing group
3. Record – Record
    - Grouping – Link one record to other record(s) within same or different groups
    - Ungrouping – Unlink records from within existing groups

Contents

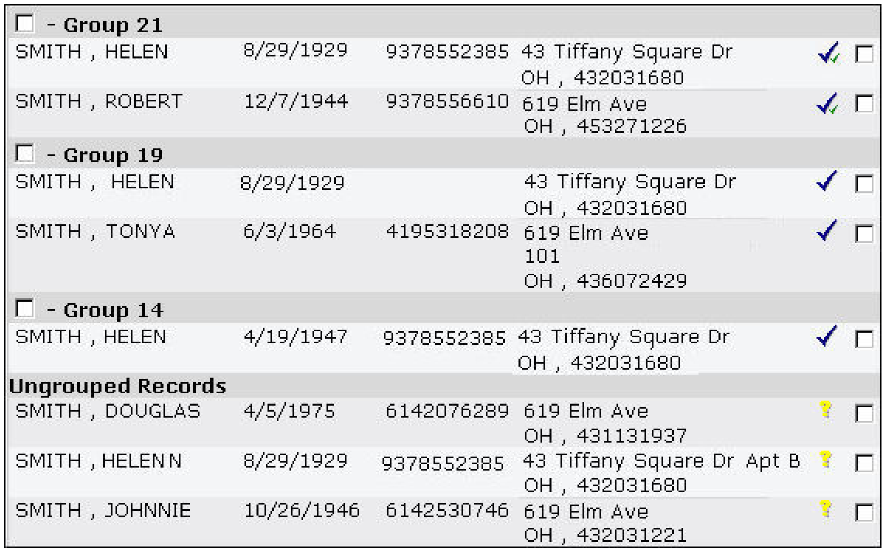
This chapter contains the following topics:

Group Maintenance Examples

Status Keys

PMP uses three different status keys to indicate how a record has been grouped.

Power Search Grouped Manually Grouped Not Grouped



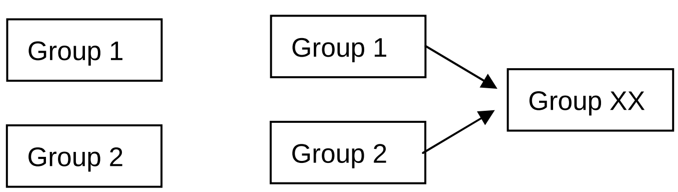
- Group 21			
SMITH , HELEN	8/29/1929	9378552385	43 Tiffany Square Dr OH , 432031680
SMITH , ROBERT	12/7/1944	9378556610	619 Elm Ave OH , 453271226
- Group 19			
SMITH , HELEN	8/29/1929		43 Tiffany Square Dr OH , 432031680
SMITH , TONYA	6/3/1964	4195318208	619 Elm Ave 101 OH , 436072429
- Group 14			
SMITH , HELEN	4/19/1947	9378552385	43 Tiffany Square Dr OH , 432031680
Ungrouped Records			
SMITH , DOUGLAS	4/5/1975	6142076289	619 Elm Ave OH , 431131937
SMITH , HELEN N	8/29/1929	9378552385	43 Tiffany Square Dr Apt B OH , 432031680
SMITH , JOHNNIE	10/26/1946	6142530746	619 Elm Ave OH , 432031221

Group - Group

Group – Group

- Link two groups
  Example: Group 1 and Group 2 are grouped together to form a new group.

Before After



Continued on next page

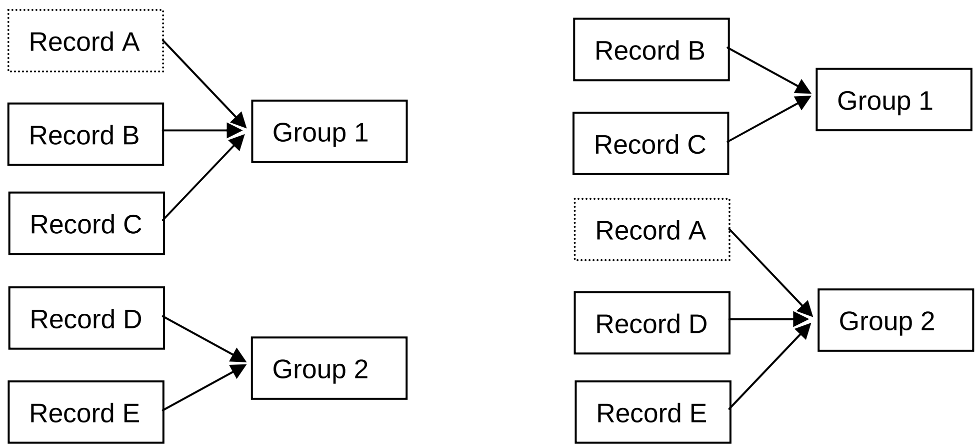
Group Maintenance Examples, Continued

Group – Record

Group – Record

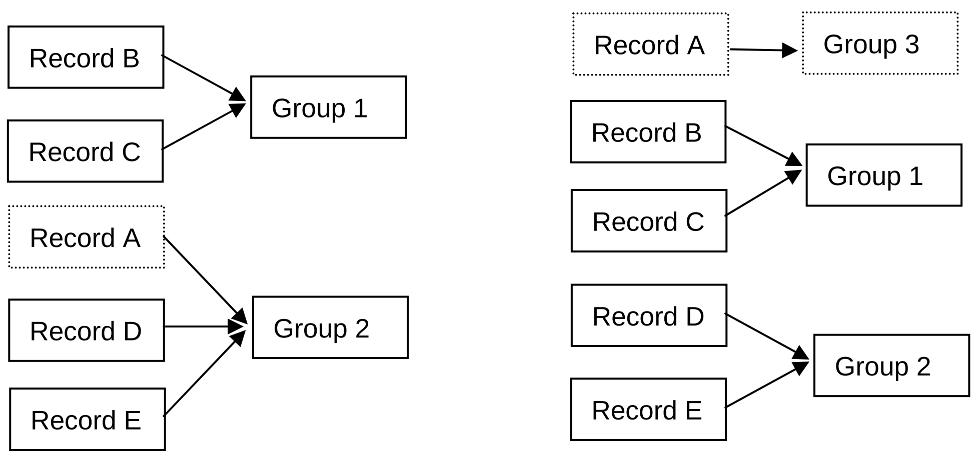
- Grouping – Link a record in one group to an already existing group
  Example: Record A in Group 1 is grouped to Group 2.

Before After



- Ungrouping – Unlink a record from an existing group
  Example: Record A is ungrouped from Group 2, and forms a new group.

Before After



Continued on next page

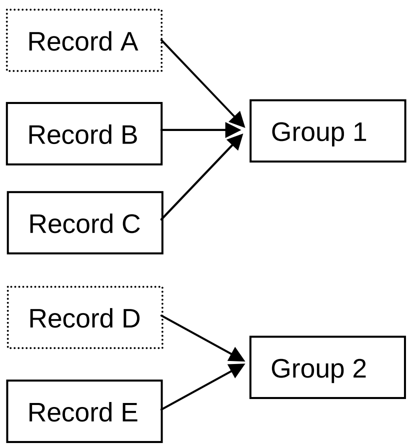
Group Maintenance Examples, Continued

Record - Record

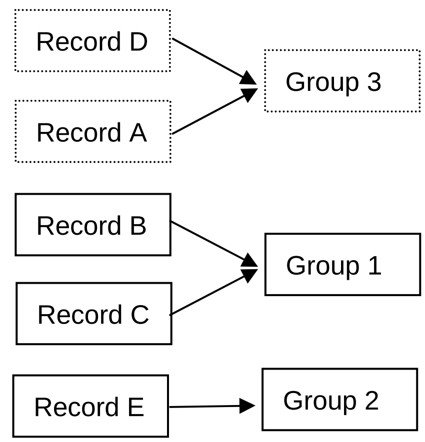
Record – Record

- Grouping – Link one record to other record(s) within same or different groups.
  Example: Record A and Record D are linked together and form a new group.

Before

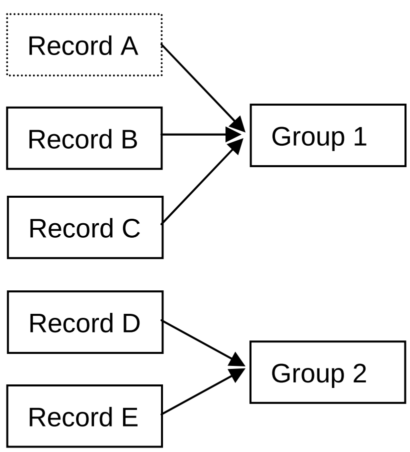


After

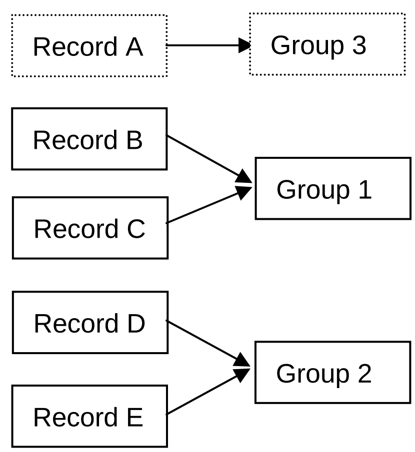


- Ungrouping – Unlink records from within existing groups.
  Example: Record A is ungrouped, and forms a new group.

Before

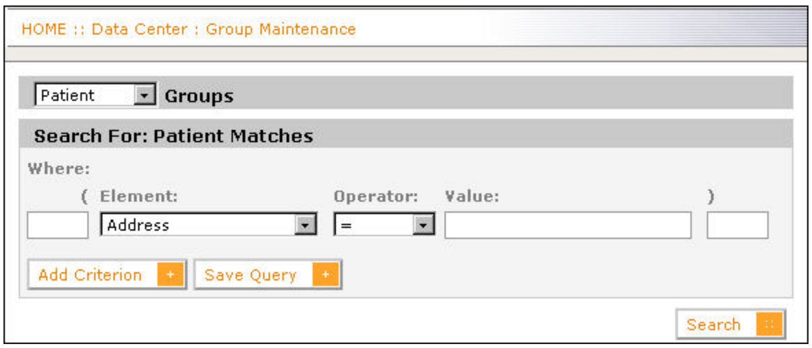
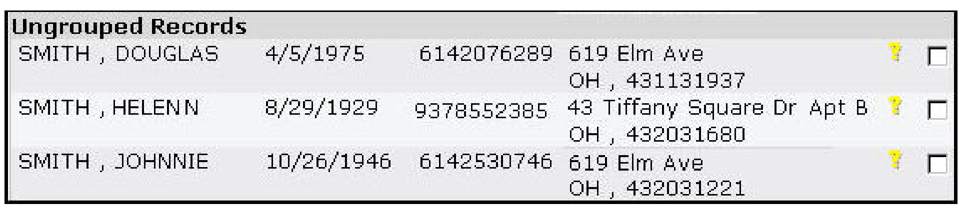


After



Grouping Patients

Procedure Follow the steps in the table below to group patients.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Data Center.</td></tr>
<tr><td>2</td><td>Click Group Maintenance.
Result: The Group Maintenance page appears.

</td></tr>
<tr><td>3</td><td>For each criterion, select the criterion operator and type in the value to be used.</td></tr>
<tr><td>4</td><td>Click the Search button.
Result: A grid appears and displays all the patients that match your search criteria.

</td></tr>
</table>

Continued on next page

Grouping Patients, Continued

Procedure (continued)

Step	Action
5	Click the **Sel.** check box next to the patients you want to be grouped together.
6	Click the **Group** button. **Result**: The Patients are grouped together. 

Group Maintenance Page Descriptions

Group Maintenance Page Descriptions

Field/Button	Description
Search Criteria	
Address	Type the address or part of the address of the patient.
Customer Identifier	Type the customer identifier. Customer identifiers are the identifiers provided along with the prescription records for the patients. These could be Social Security Numbers, driver license numbers, etc.
Date Of Birth	Type the date of birth.
First Name	Type the first name or part of the first name.
Last Name	Type the last name or part of the last name.
Zip	Type the Zip code.
Data Grid Column Headings	
Name	The patient's complete name.
Date Of Birth	The patient's date of birth.
Phone Number	The patient's phone number.
Address	The street address where the patient resides.
<Check box to Select>	Check the check box next to the patient you want to select.

Viewing Patient Details

Introduction

Viewing the patient details is used to help determine if this patient/practitioner is the same as another with similar information.

From the Patient Details page you can view the following information about the patient:

- Any other patients that the patient might be grouped (matched) with.
- Prescriptions that have been filled.
- Practitioners that the patient has visited.
- Pharmacies that the patient used.
- Unsolicited requests that were sent regarding the patient.

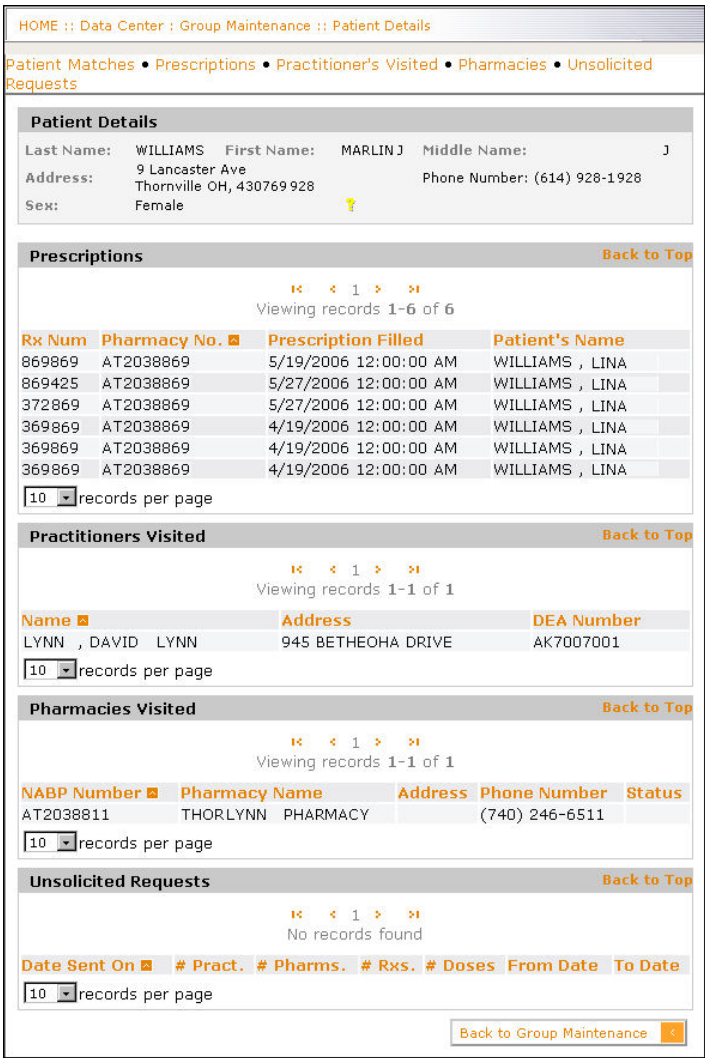
Continued on next page

Viewing Patient Details, Continued

Procedure

Follow the steps in the table below to view a patient's details after you have performed a search.

Step	Action
1	In the data grid, click on any item in the patient's row. **Result**: The Patient Details page appears.



HOME :: Data Center : Group Maintenance :: Patient Details

Patient Matches • Prescriptions • Practitioner's Visited • Pharmacies • Unsolicited Requests

Patient Details

Last Name:	WILLIAMS	First Name:	MARLIN J	Middle Name:	J
Address:	9 Lancaster Ave Thornville OH, 430769 928			Phone Number: (614) 928-1928	
Sex:	Female				

Prescriptions Back to Top

1

Viewing records 1-6 of 6

Rx Num	Pharmacy No.	Prescription Filled	Patient's Name
869869	AT2038869	5/19/2006 12:00:00 AM	WILLIAMS , LINA
869425	AT2038869	5/27/2006 12:00:00 AM	WILLIAMS , LINA
372869	AT2038869	5/27/2006 12:00:00 AM	WILLIAMS , LINA
369869	AT2038869	4/19/2006 12:00:00 AM	WILLIAMS , LINA
369869	AT2038869	4/19/2006 12:00:00 AM	WILLIAMS , LINA
369869	AT2038869	4/19/2006 12:00:00 AM	WILLIAMS , LINA

10 records per page

Practitioners Visited Back to Top

1

Viewing records 1-1 of 1

Name	Address	DEA Number
LYNN , DAVID LYNN	945 BETHEOHA DRIVE	AK7007001

10 records per page

Pharmacies Visited Back to Top

1

Viewing records 1-1 of 1

NABP Number	Pharmacy Name	Address	Phone Number	Status
AT2038811	THORLYNN PHARMACY		(740) 246-6511	

10 records per page

Unsolicited Requests Back to Top

1

No records found

Date Sent On	# Pract.	# Pharms.	# Rxs.	# Doses	From Date	To Date

10 records per page

Back to Group Maintenance

Continued on next page

Viewing Patient Details, Continued

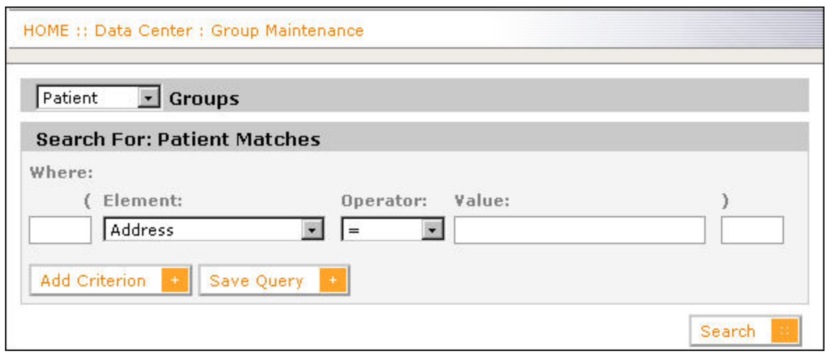
Procedure (continued)

Step	Action
2	The Patient Details page provides an overview of the patient's details. To view a specific portion of the details: • Click on one of the links (Prescriptions, Practitioner's Visited, etc.) at the top of the page Or • Click on a specific row in any of the data grids. Ex. The name of the practitioner that the patient visited. **Result**: The corresponding page appears.

Ungrouping Patients

Procedure

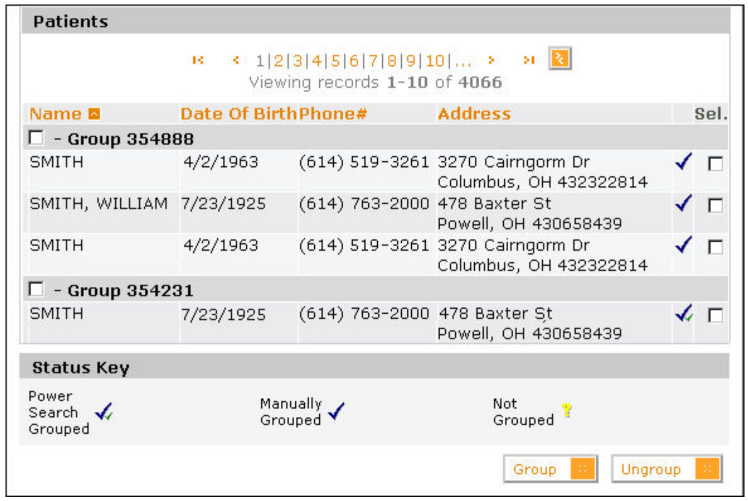
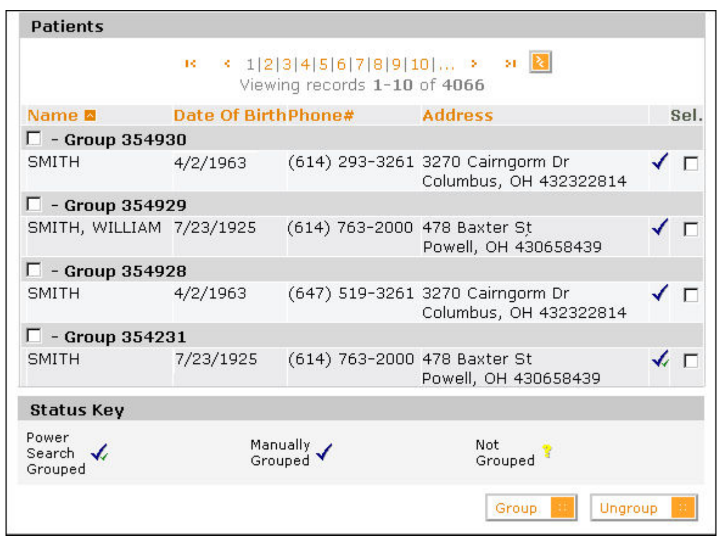
Follow the steps in the table below to ungroup a patient from a group.

Step	Action
1	From the main menu, click +**Data Center**.
2	Click **Group Maintenance**. **Result**: The Group Maintenance page appears. 
3	For each criterion, select the criterion operator and type in the value to be used.

Continued on next page

Ungrouping Patients, Continued

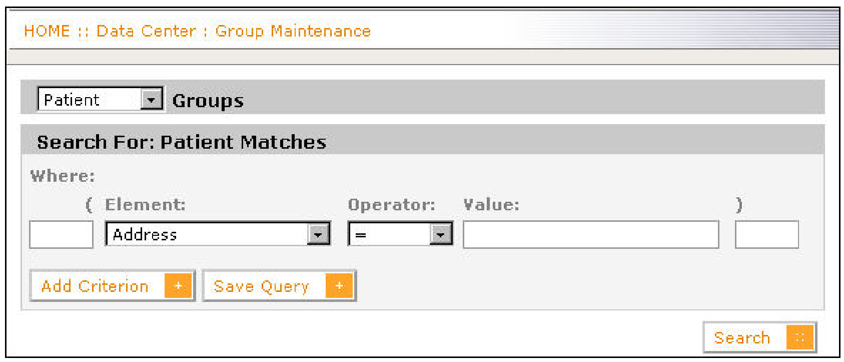
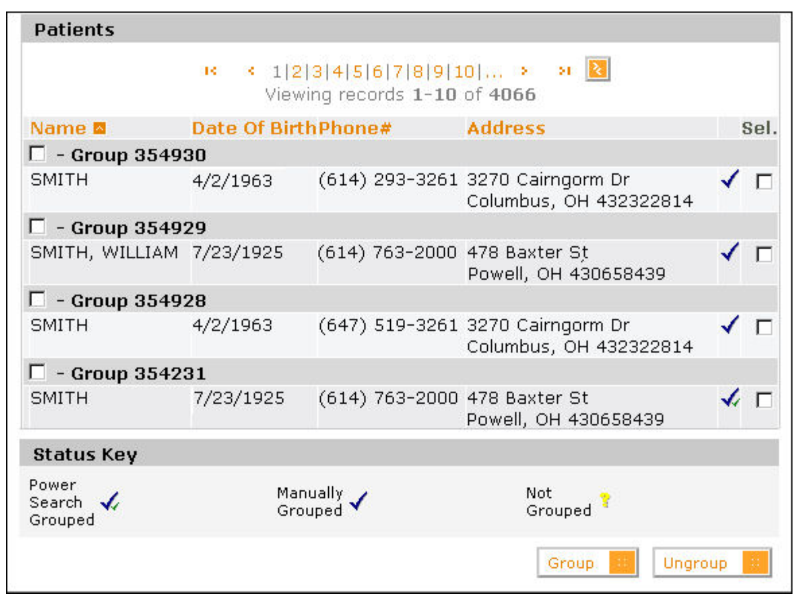
Procedure (continued)

Step	Action
4	Click the **Search** button. **Result**: A grid displays all the patients that match your search criteria. 
5	Select the patient you want to ungroup.
6	Click the **Ungroup** button. **Result**: The patient is removed from the group and put into a group on its own. 

Combining Groups of Patients

Procedure

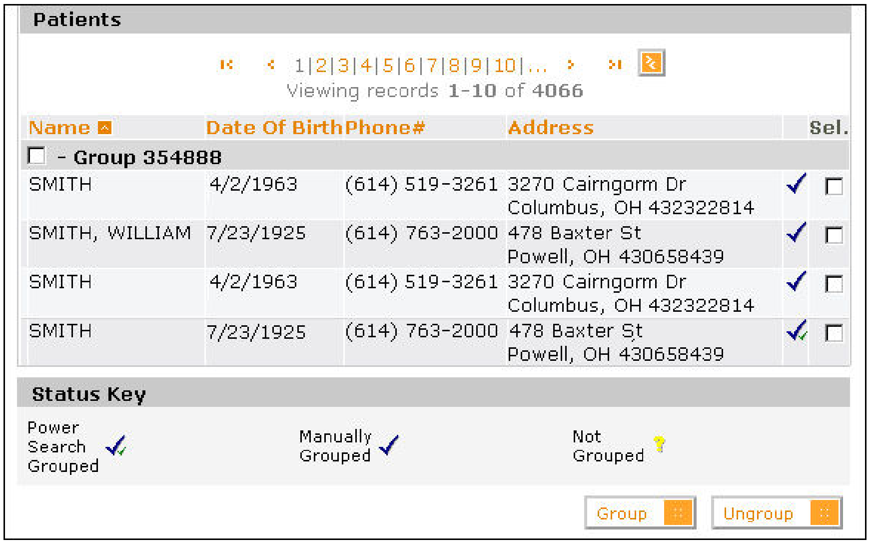
Follow the steps in the table below to combine groups.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Data Center.</td></tr>
<tr><td>2</td><td>Click Group Maintenance.
Result: The Group Maintenance page appears.

</td></tr>
<tr><td>3</td><td>For each criterion, select the criterion operator and type the value to be used.</td></tr>
<tr><td>4</td><td>Click the Search button.
Result: A grid displays all the patients (or groups) that match your search criteria.

</td></tr>
</table>

Continued on next page

Combining Groups of Patients, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the checkbox beside the groups that you want to combine in to one.</td></tr>
<tr><td>6</td><td>Click the Group button.
Result: The groups are combined.

</td></tr>
</table>

Chapter 8: Verifying DEA Numbers for Prescriptions

Overview

Introduction

The Resolve DEA Numbers function allows you to check and resolve DEA numbers for prescriptions whose DEA numbers were not present in the practitioner table at the time the prescription data was loaded.

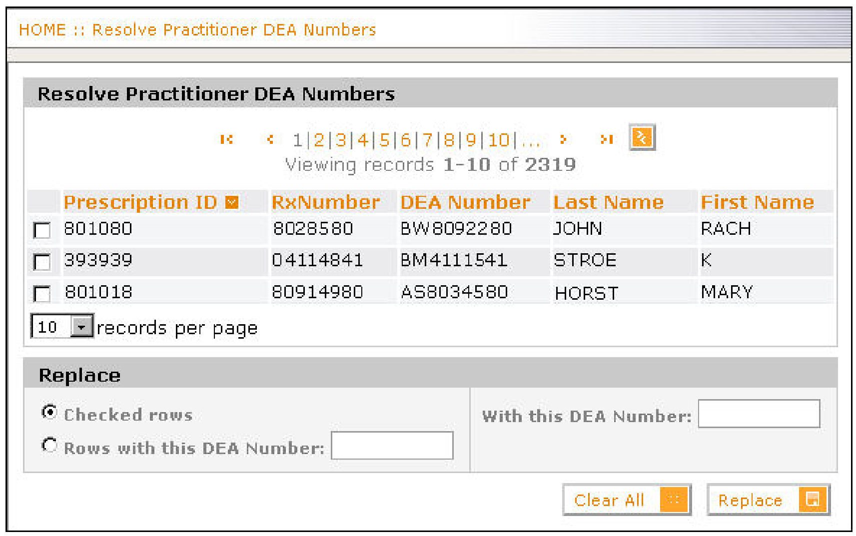
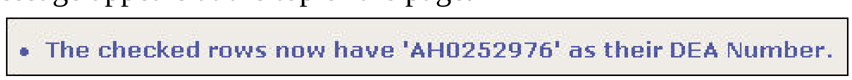
Contents

This chapter contains the following topics:

Resolving DEA Numbers for Specific Records

Procedure

Follow the steps in the table below to resolve DEA numbers for specific records.

Step	Action
1	From the main menu, click +**Data Center.**
2	Click **Resolve DEA Nums**. **Result**: The Resolve Practitioner DEA Numbers page appears. 
3	Select the rows for which you want to replace the DEA numbers.
4	Click the **Checked Rows** radio button in the Replace section.
5	In the **With this DEA Number** field, type the DEA number that you want to use to replace the existing DEA number.
6	Click the **Replace** button. **Result**: The system replaces the DEA number for the selected prescriptions with the replacement DEA number. The following message appears at the top of the page.  **Note**: The grid only displays rows that have DEA numbers that need to be resolved. Once the number has been resolved, the row(s) disappear from the grid.

Resolve DEA Numbers Page Descriptions

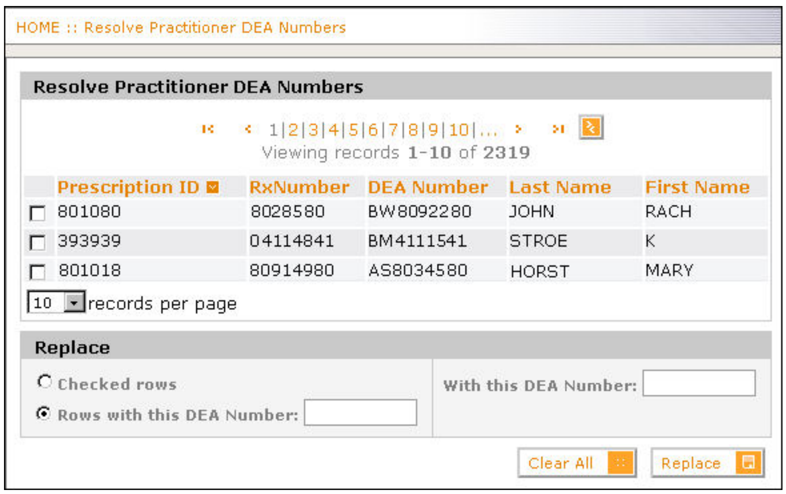
Resolve DEA Number Page Descriptions

Field/Button	Description
Data Grid Column Headings	
Prescription ID	Internal prescription number for the prescription.
DEA Number	The DEA Number on the prescription record.
Last Name	The patient’s last name.
First Name	The patient’s first name.
Other Fields	
Checked Rows radio button	Specify whether all the prescriptions with a particular DEA number should be processed for replacement or only the selected rows should be processed.
Rows With this DEA Number	Specify that you want to change a particular row with an existing DEA number.
With this DEA Number	The new DEA number value to be replaced into the prescriptions.
Clear All button	Clear all the check boxes that were selected on the page.
Replace button	Replace the values.

Replacing a Specific DEA Number with Another Across all Prescription Records

Procedure

Follow the steps in the table below to replace a specific DEA number across all prescription records.

Step	Action
1	From the main menu, click **+Data Center**.
2	Click **Resolve DEA Nums.** **Result**: The Resolve Practitioner DEA Nums page appears. 
3	Click the **Rows with this DEA Number** radio button in the Replace section.
4	Type the DEA number you want to replace in the **Rows with this DEA Number** field.
5	Type the new DEA number in the **With this DEA Number** field.
6	Click the **Replace** button. **Result**: The system replaces the DEA number for the selected prescriptions with the replacement DEA number.

Chapter 9: Verifying NDC Codes for Prescriptions

Overview

Introduction

The Resolve NDC Codes function allows you to check and resolve NDC codes for prescriptions whose NDC codes were not present in the NDC table at the time of loading the prescription data.

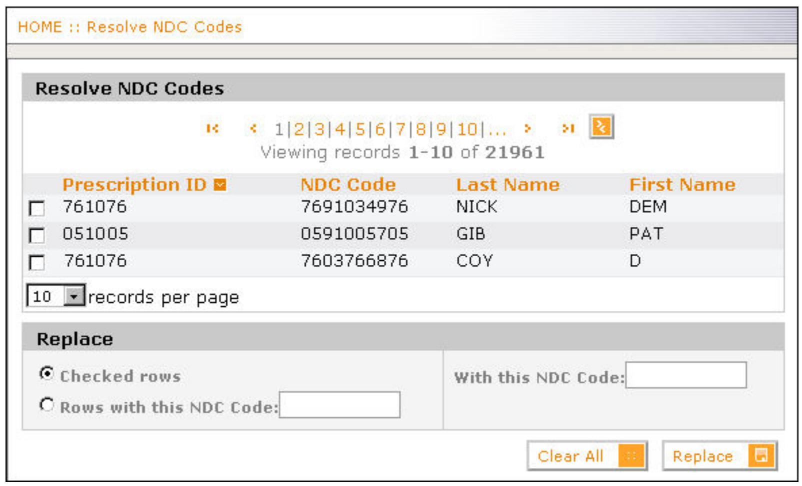
Contents

This chapter contains the following topics:

Resolving NDC Codes for Specific Records

Procedure

Follow the steps in the table below to resolve NDC codes for specific records.

Step	Action
1	From the main menu, click **+Data Center.**
2	Click **Resolve NDC Codes**. **Result**: The Resolve NDC Codes page appears. 
3	Select the rows for which you want to replace the NDC codes.
4	Click the **Checked Rows** radio button in the Replace section.
5	In the **With this NDC Code** field, type the NDC code that you want to use to replace the existing NDC code.
6	Click the **Replace** button. **Result**: The system replaces the NDC codes after checking for the existence of the replacement NDC code in the database. The following message appears at the top of the page.  **Note**: The grid only displays rows that have NDC codes that need to be resolved. Once the number has been resolved, the row(s) disappear from the grid.

Resolve NDC Codes Page Descriptions

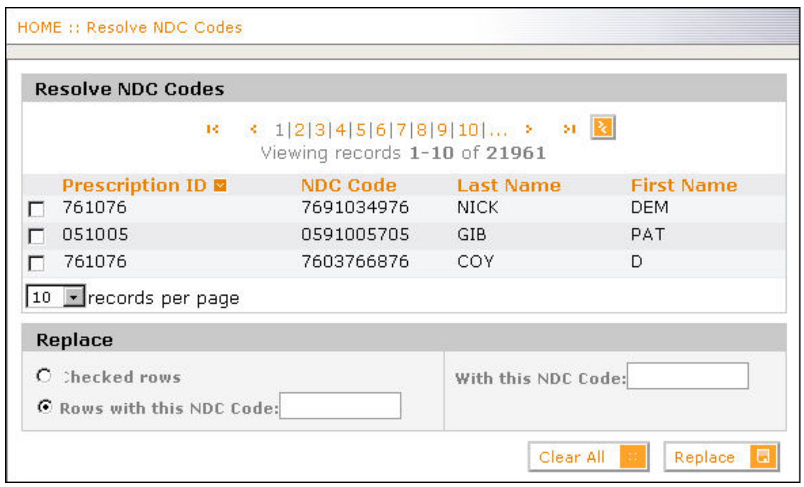
Resolve NDC Codes Page Descriptions

Field/Button	Description
Data Grid Column Headings	
Prescription ID	Internal prescription number (in the database) for the prescription.
NDC Code	The NDC code on the prescription record
Last Name	The patient’s last name.
First Name	The patient’s first name.
Other Fields	
Radio button	Specify whether all the prescriptions with a particular NDC code should be processed for replacement or only the selected rows should be processed.
Rows With this NDC Code	The NDC code that will be replaced if processing is for all NDC codes with a particular value.
With this NDC Code	The new NDC code value to be replaced into the prescriptions.
Clear All button	Clear all the check boxes that were selected on the page.
Replace button	Replace the values.

Replacing a Specific NDC Code with Another Across all Prescription Records

Procedure

Follow the steps in the table below to replace a specific NDC code with another across all prescription records.

Step	Action
1	From the main menu, click +**Data Center**.
2	Click **Resolve NDC Codes**. **Result**: The Resolve NDC Codes page appears. 
3	Click the **Rows with this NDC Code** radio button in the Replace section.
4	Type the NDC code you want to replace in the **Rows with this NDC Code** field.
5	Type the new NDC code in the **With this NDC Code** field.
6	Click the **Replace** button. **Result**: The system replaces the NDC codes after checking for the existence of the replacement NDC code in the database.

Chapter 10: Changing a Pharmacy Number

Overview

Introduction

The Resolve NABP Number function allows you to search for and change a pharmacy number. The NABP number is a number used to identify a pharmacy.

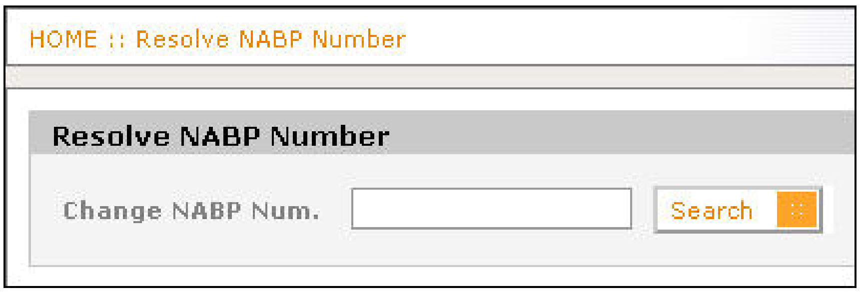
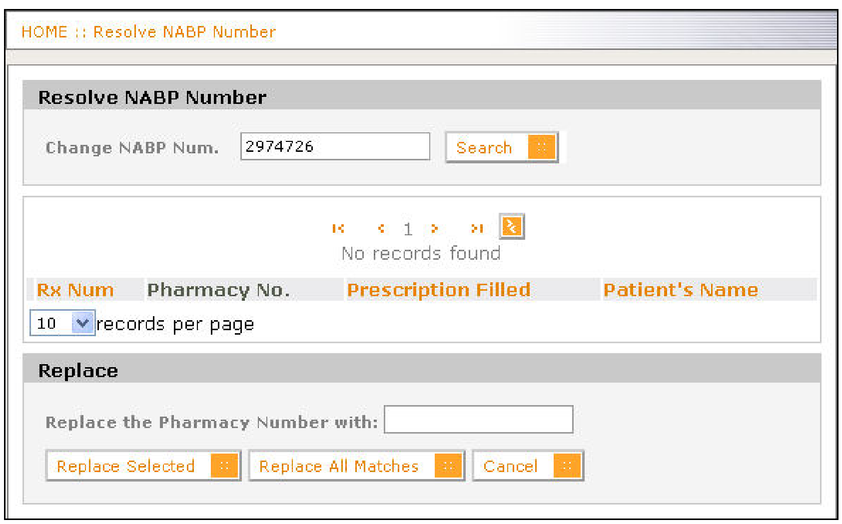
Contents

This chapter contains the following topics:

Changing an NABP Number

Procedure

Follow the steps in the table below to change an NABP number.

Step	Action
1	From the main menu, click **+Data Center**.
2	Click **Resolve NABP Number**. **Result**: The Resolve NABP Number page appears. 
3	Type the NABP number that you want to change in the **Change NABP Num.** field.
4	Click the **Search** button. **Result**: The search results are displayed. 

Continued on next page

Changing an NABP Number, Continued

Procedure (continued)

Step	Action
5	Type the new pharmacy number in the **Replace the Pharmacy Number** with field.
6	Click the **Replace Selected** button to replace the pharmacy number on the selected prescriptions or click the **Replace All Matches** button to replace the pharmacy number on all the prescriptions.

Resolve NABP Number Page Descriptions

Resolve NABP Number Page Descriptions

Field/Button	Description
Pharmacy Search Criteria	
Change NABP Num.	The NABP number of the pharmacy that you want to search for and change.
Rx Num	The number used to identify the prescription.
Pharmacy No	The NABP number used to identify a pharmacy.
Prescription Filled	The date the prescription was filled at that particular pharmacy.
Patient’s Name	The name of the patient who prescription was filled at that particular pharmacy.
Replace	
Replace the Pharmacy Number with	The new pharmacy number.
Replace Selected button	Replace the selections with the new pharmacy number.
Replace All Matches button	Replace the entire grid with the new pharmacy number.

Chapter 11: Updating the Database with New Data

Overview

Introduction

The File Upload function allows you to update the database with new data in flat files for the following types of data:

- Ingredient
- NDC Codes
- Pharmacy
- Practitioner
- Prescription
- Therapeutic Class Codes

Note: The procedure for uploading data is the same for all data types except for Practitioner.

PMP currently accepts prescription upload files based on the ASAP 1995 and the ASAP 2005 format of prescription reporting simultaneously.

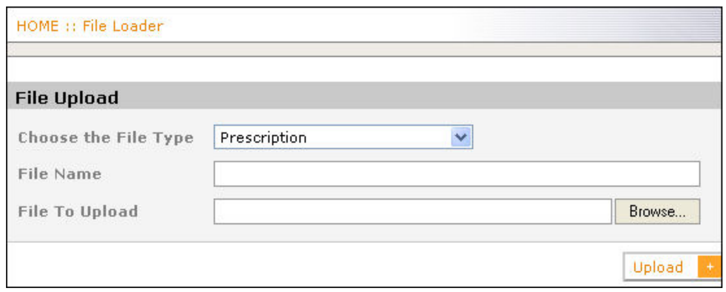
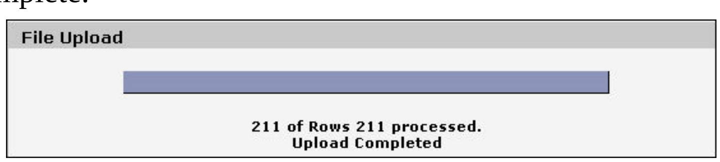
Contents

This chapter contains the following topics:

Uploading New Data

Procedure

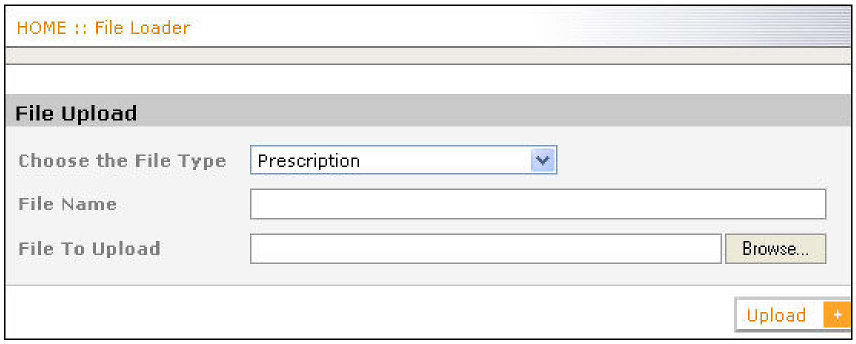
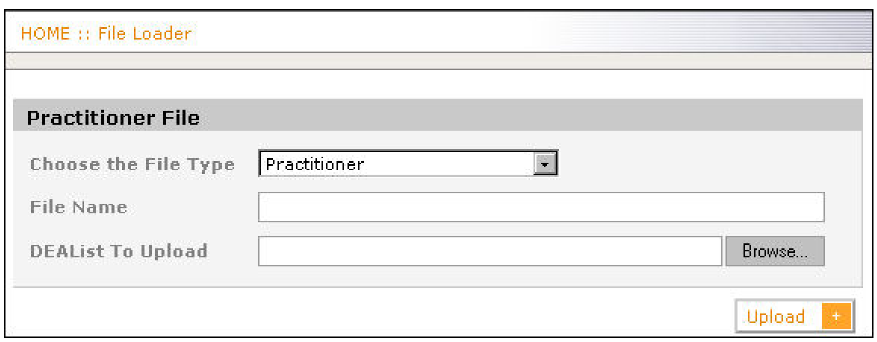
Follow the steps in the table below to upload new data.

Step	Action
1	From the main menu, click **+Upload Center**.
2	Click **Admin File Upload**. **Result**: The File Loader page appears. 
3	In the **Choose the File Type** drop-down menu, select the type of data that want to upload. Choose one of the following types of data: • Pharmacy • Practitioner • Prescription • NDC Code • Ingredient • Therapeutic Class Codes **Note**: This procedure is the same for all data types except for Practitioner.
4	Name the identifier you want to use for the file you are uploading.
5	Click the **Browse** button and select the file you want to upload from the disk.
6	Click the **Upload** button. **Result**: The system displays a message to indicate that the process is complete. 

Uploading Practitioner Data

Procedure

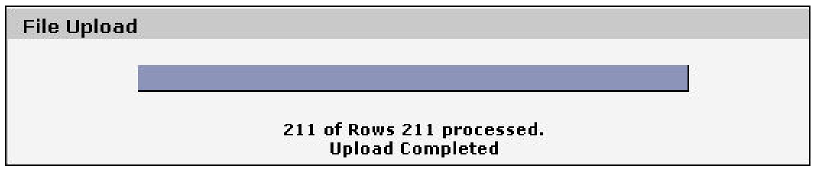
Follow the steps in the table below to upload practitioner data.

Step	Action
1	From the main menu, click **+Upload Center.**
2	Click Admin **File Upload**. **Result**: The File Loader page appears. 
3	In the **Choose the File Type** drop-down menu, select **Practitioner**. **Result**: The system displays the fields which are used for finding Practitioner data files. 
4	Name the identifier you want to use for the file you are uploading. **Note**: The Practitioner data file name must be compliant with the .xml map file name.

Continued on next page

Uploading Practitioner Data, Continued

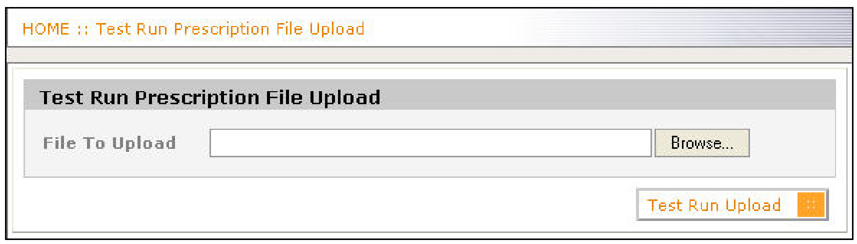
Procedure
(continued)

Step	Action
7	Click the **Browse** button next to the **DEA List File to Upload** field and select the DEA List file from the disk.
8	Click the **Upload** button. **Result**: The system displays a message to indicate that the process is complete. 

Testing Upload of a Prescription Data File Sent for the Entire State

Procedure

Follow the steps in the table below to test upload of a prescription data file sent for the entire state.

Step	Action
1	From the main menu, click +**Upload Center**.
2	Click **Test Run Upload**. **Result**: The Test Run Prescription File Upload page appears. 
3	In the **File to Upload** field, click the **Browse** button to search for the file.
4	Click the **Test Run Upload** button. **Result**: The system performs a test run and comes back with a list of errors that would be encountered in processing the selected prescription file.

Chapter 12: Uploading and Viewing Files Sent on Diskette

Overview

Introduction

The Upload Pharmacy Diskettes functions allow you to upload files sent by pharmacies on diskettes and to view the files that were uploaded in this manner. It also allows you to send an email to the pharmacy that sent in the diskette and to print and send a report on the processing of the file that was sent in.

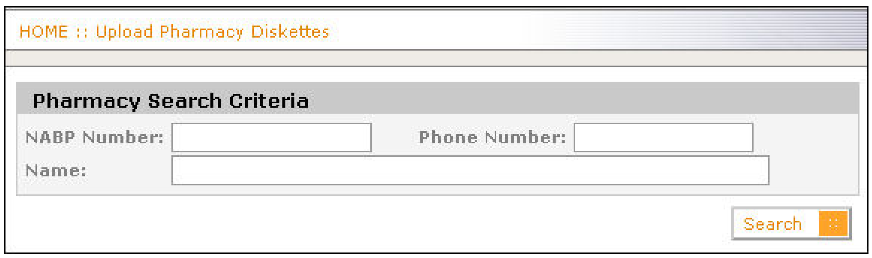
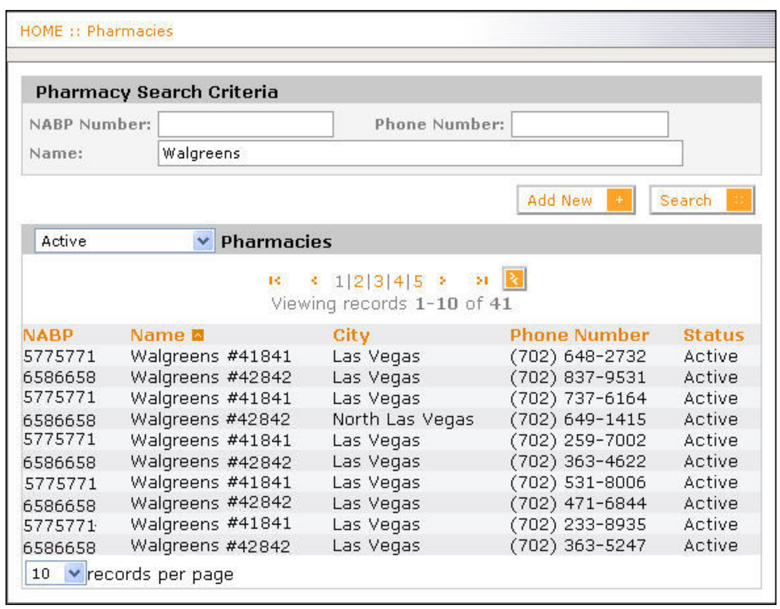
Contents

This chapter contains the following topics:

Uploading Prescription Data Sent by Pharmacy on a Diskette

Procedure

Follow the steps in the table below to upload prescription data sent by a pharmacy on a diskette.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Upload Center.</td></tr>
<tr><td>2</td><td>Click Upload Pharmacy Diskettes.
Result: The Pharmacy Search page appears.

</td></tr>
<tr><td>3</td><td>Enter the search criteria to select the pharmacy that sent in the diskette.</td></tr>
<tr><td>4</td><td>Click the Search button.
Result: The search results are displayed.

</td></tr>
</table>

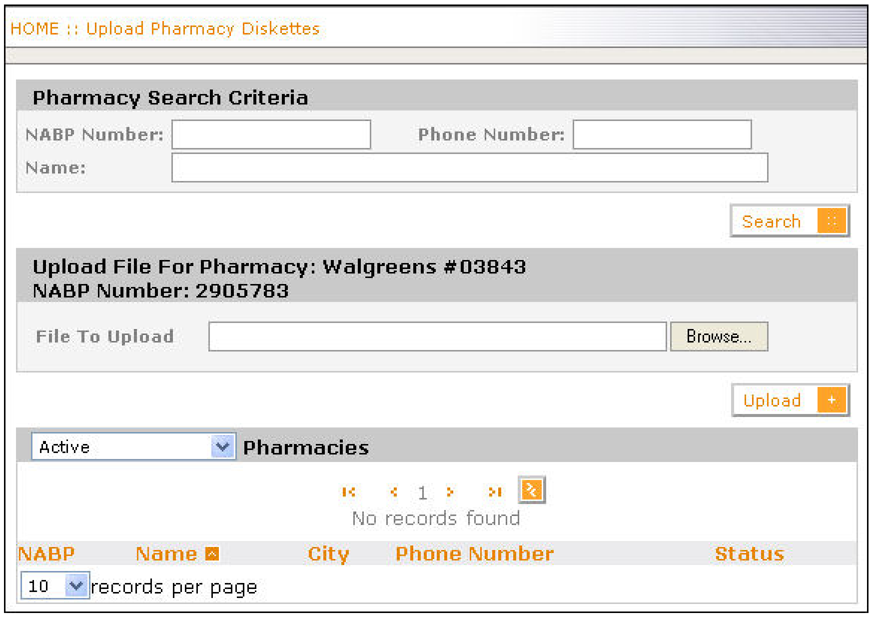
Continued on next page

Uploading Prescription Data Sent by Pharmacy on a Diskette,
Continued

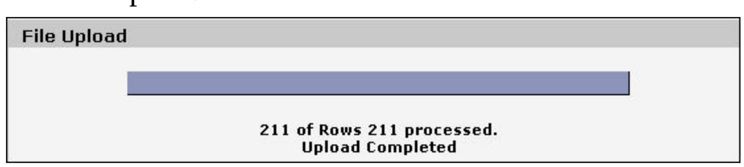
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Select the pharmacy from which to upload the file.

Result: The page is refreshed with the selected pharmacy information.


</td></tr>
<tr><td>6</td><td>Click the Browse button and select the file you want to upload from the diskette.</td></tr>
<tr><td>7</td><td>Click the Upload button.

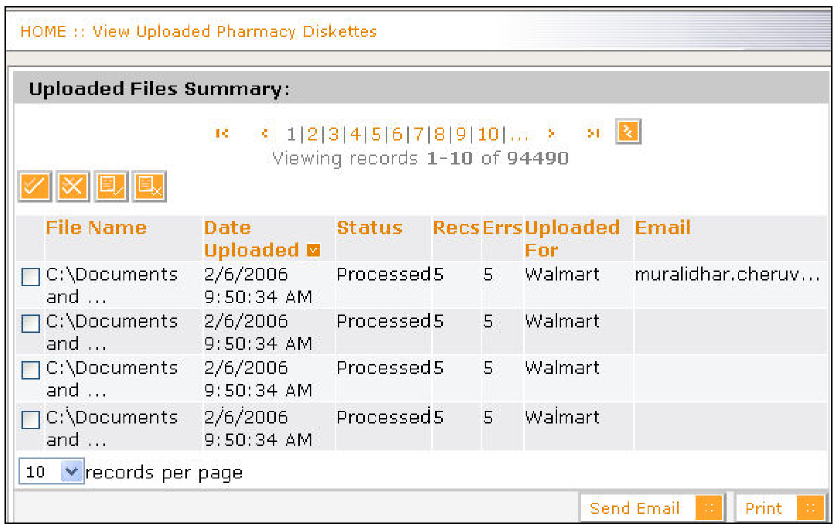
Result: The system displays a message to indicate that the upload process is complete.


</td></tr>
<tr><td>8</td><td>To immediately upload another file go back to Step 3.</td></tr>
</table>

Viewing Uploaded Prescription Data Files Sent by Pharmacy on a Diskette

Procedure

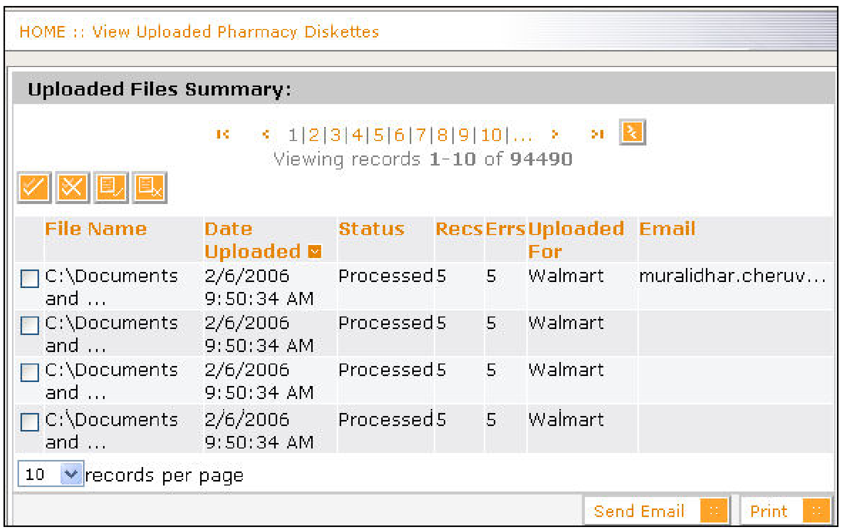
Follow the steps in the table below to view the uploaded prescription data files sent by a pharmacy on a diskette.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Upload Center.</td></tr>
<tr><td>2</td><td>Click View Uploaded Pharmacy Diskettes.
Result: The Uploaded Files Summary page appears.

</td></tr>
<tr><td>3</td><td>Click on a specific file row to view a letter that can be sent to the pharmacy for errors in processing as well as the error report itself.</td></tr>
</table>

Sending Emails to Pharmacies that Sent Prescription Data Files on a Diskette

Procedure

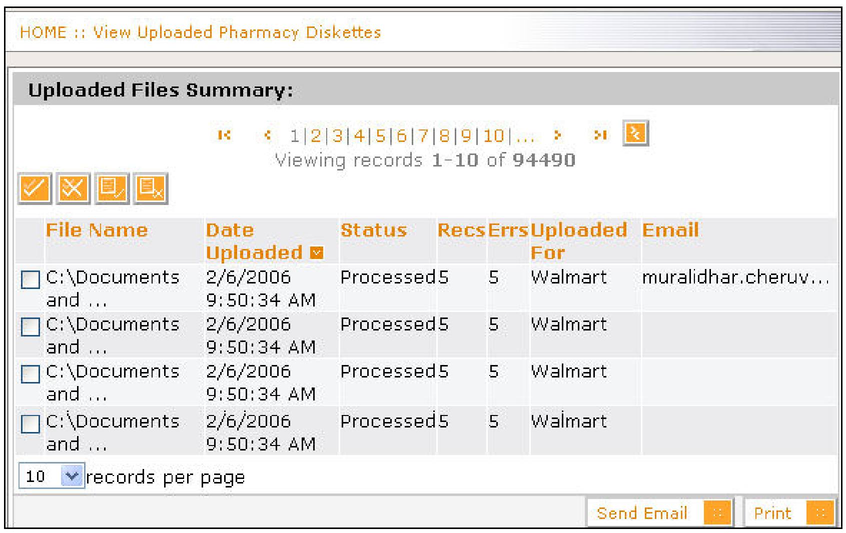
Follow the steps in the table below to send emails to the pharmacies that sent prescription data files on a diskette.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Upload Center.</td></tr>
<tr><td>2</td><td>Click View Uploaded Pharmacy Diskettes.
Result: The Uploaded Files Summary page appears.

</td></tr>
<tr><td>3</td><td>Select the check boxes in the rows for which you would like an email sent to the respective pharmacies.</td></tr>
<tr><td>4</td><td>Click on the Send Email button.
Result: The system sends an email to each of those pharmacies selected that have an email contact with a portal system message that can be customized using portal maintenance functionality.</td></tr>
</table>

Printing and Mailing Reports with a Cover Letter to Pharmacies that Sent Prescription Data Files on a Diskette

Procedure

Follow the steps in the table below to print and mail a report with a cover letter about the processing to pharmacies that sent prescription data files on a diskette.

Step	Action
1	From the main menu, click **+Upload Center**.
2	Click **View Uploaded Pharmacy Diskettes**. **Result**: The Uploaded Files Summary page appears. 
3	Select the check boxes in the rows for which you would like a report with cover letter printed for the respective pharmacies.
4	Click the **Print** button. **Result**: The system opens up a separate window in which it displays all the cover letters and reports in a pdf format. These can be printed and mailed to the respective pharmacies.

Prescription Analysis Function

Chapter 13: Viewing Patients Whose Prescription Usage Exceeded Threshold Values

Overview

Introduction

The Threshold Search function allows you to search for patients whose prescription usage has exceeded the threshold values. It also allows you to select and mark some of the patients for sending an unsolicited request.

Contents

This chapter contains the following topics:

Searching for Patients Exceeding Threshold Usage

Procedure

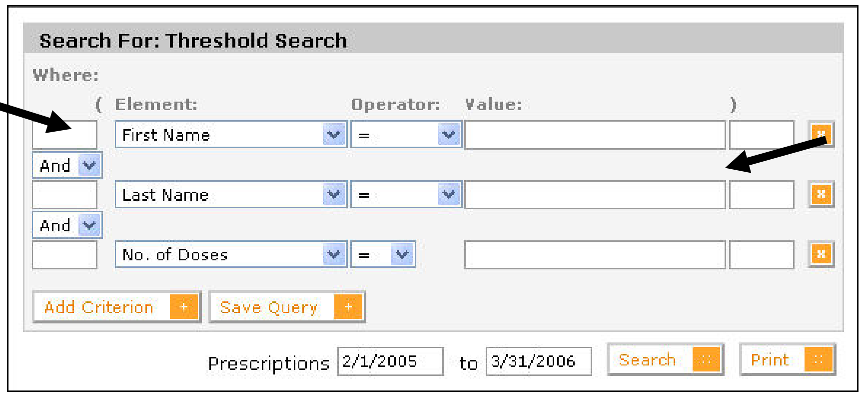
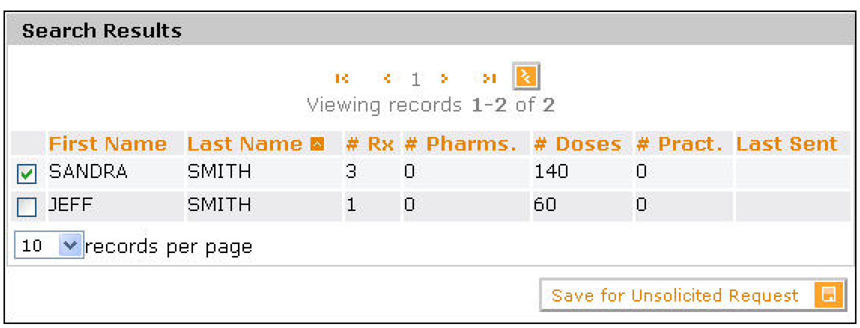
Follow the steps in the table below to search for patients exceeding the threshold usage.

Step	Action
1	From the main menu, click +**Prescription Analysis**.
2	Click **Threshold Search**. **Result**: The Patient Threshold Search page appears. 
3	From the **Element** drop-down menu, select the appropriate element that you want to search.
4	Select an operator from the **Operator** drop-down menu and specify a value.
5	If you want to search for several elements by using Boolean expressions, click the **Add Criterion** button and complete the information for each criterion.
6	From the drop-down menus between each phrase, select an **And** or **Or** operator.

Continued on next page

Searching for Patients Exceeding Threshold Usage, Continued

Procedure (continued)

Step	Action
7	To force the order of processing, type parentheses around the phrases that you want to process first. **Note**: Parentheses are used to force the order of processing. For example, if you surround the "And" phrases in your search with parentheses, the search engine processes this part of the search first and then combines this result with the last part of the search. By using this method, you are assured that the "And" terms are kept together as a logical unit. **Note**: Use multiple parentheses in a field to define nested logical expressions. 
8	Click the **Search** button. **Result**: The system displays a list of patients who matched the specified criteria. 

Threshold Search Page Descriptions

Threshold Search Page Descriptions

Field/Button	Description
Search For	
Open Parentheses	Type one or more open parentheses in this field to logical group search criteria.
Element	Select the element to search on – Last Name, First Name, Date Of Birth, and Address.
Operator	Select the relational operator for the search criteria.
Value	Type the value to be used in the search criteria.
Close Parentheses	Type one or more close parentheses in this field to logical group search criteria.
Add Criterion button	Add an additional criterion.
Save Query button	Save your query so you do not have to retype the search criteria again. For more information, see “Using the Saved Query List function” on page 141.
Prescriptions	Start of date range for which prescriptions should be reported.
To	End of date range for which prescriptions should be reported.
Search Results	
<Check box>	Select this check box if you want to mark and save this patient for sending an unsolicited request.
First Name	The patient’s first name.
Last Name	The patient’s last name.
#Rx	The number of prescriptions a patient has bought within the specified period.
#Pharms.	The number of pharmacies the patient has purchased prescriptions from within the specified period.

Continued on next page

Threshold Search Page Descriptions, Continued

Threshold Search Page Descriptions (continued)

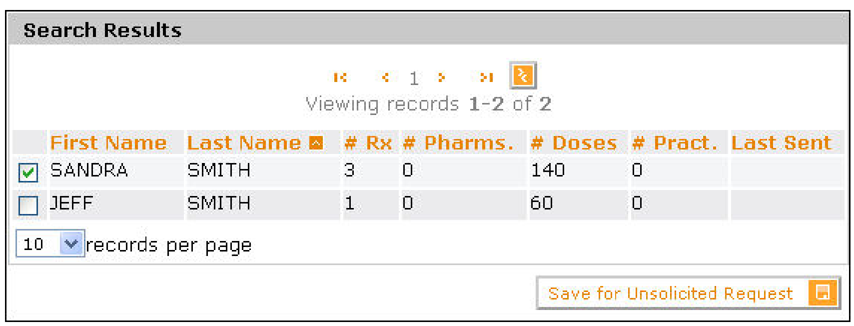
Field/Button	Description
#Doses	The number of doses the patient has bought within the specified period.
#Pract.	The number of practitioners who prescribed medication to a patient within the specified period.
Last Sent	The last time a utilization request was sent for this particular patient.

Marking Patients Who Exceeded Threshold Usage for Sending an Unsolicited Request

Procedure

Follow the steps in the table below to search for patients exceeding threshold usage and mark them for sending an unsolicited request.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Prescription Analysis.</td></tr>
<tr><td>2</td><td>Click Threshold Search.
Result: The Patient Threshold Search page appears.

</td></tr>
<tr><td>3</td><td>Modify the values and click the Search button.
Result: A grid displays all the patients that match your search criteria.

</td></tr>
<tr><td>4</td><td>Select the patients to be marked for sending an unsolicited request.</td></tr>
<tr><td>5</td><td>Click the Save for Unsolicited Request button.</td></tr>
</table>

Printing a List of Patients Who Have Exceeded Threshold Usage

Procedure

Follow the steps in the table below to print a report of patients who have exceeded threshold usage.

Step	Action
1	From the main menu, click +**Prescription Analysis**.
2	Click **Threshold Search**. **Result**: The Patient Threshold Search page appears. 
3	Modify the values and the click the **Print** button. **Result**: A pdf report displays the selected criteria.
4	Click the **Printer** icon to print the report.

Chapter 14: Viewing a Summary of Drug Usage

Overview

Introduction

The Search and Summarize Drugs function allows you to view a summary of drug usage within specific regions based on certain selection criteria.

Contents

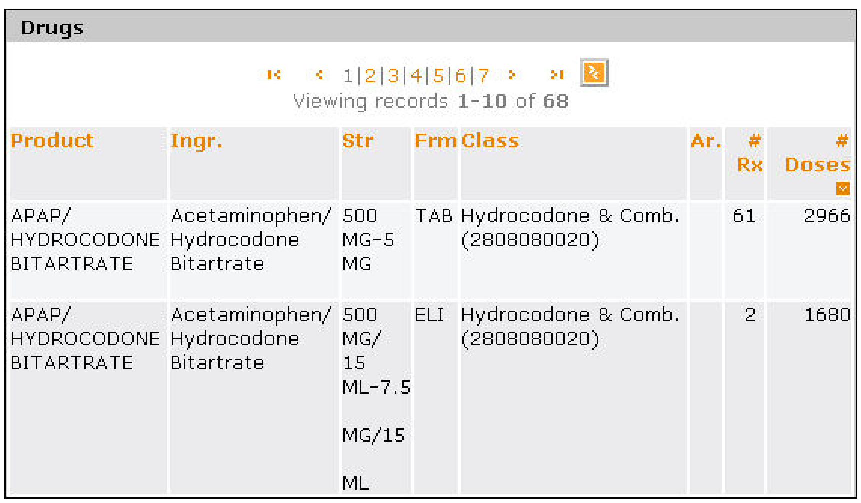
This chapter contains the following topics:

Generating Summary Information on Drug Usage

Procedure

Follow the steps in the table below to generate summary information on drug usage.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Prescription Analysis.</td></tr>
<tr><td>2</td><td>Click Search and Summarize Drugs.
Result: The Search & Summarize Drug page appears.

</td></tr>
<tr><td>3</td><td>Modify the values, and then click the Search button.
Result: A grid displays all the combinations that matched your search criteria.


Drugs
1|2|3|4|5|6|7
Viewing records 1-10 of 68
<table>
<tr><th>Product</th><th>Ingr.</th><th>Str</th><th>Frm</th><th>Class</th><th>Ar.</th><th># Rx</th><th># Doses</th></tr>
<tr><td>APAP/ HYDROCODONE BITARTRATE</td><td>Acetaminophen/ Hydrocodone Bitartrate</td><td>500 MG-5 MG</td><td>TAB</td><td>Hydrocodone & Comb. (2808080020)</td><td></td><td>61</td><td>2966</td></tr>
<tr><td>APAP/ HYDROCODONE BITARTRATE</td><td>Acetaminophen/ Hydrocodone Bitartrate</td><td>500 MG/ 15 ML-7.5 MG/15 ML</td><td>ELI</td><td>Hydrocodone & Comb. (2808080020)</td><td></td><td>2</td><td>1680</td></tr>
</table></td></tr>
</table>

Search & Summarize Page Descriptions

Search & Summarize Drugs Page Descriptions

Field/Button	Description
Ingredient	Type the ingredient name or part of the ingredient name.
Drug Class	Type the drug class name or part of the drug class name.
Product	Type the product name or part of the product name.
Strength	Type the drug strength or part of the drug strength.
Area	Select the area you want to search or 'ALL' to search all the areas.
Form	Select the form you want to search or 'ALL' to search all the forms.
Start Date	The start date for which the summary analysis will be performed.
End Date	The end date for which the summary analysis will be performed.
Data Grid Column Headings	
Product	The name of the product.
Ingredient	The name of the ingredient.
Strength	The drug strength. For example, 650 MG.
Form	The drug form. For example, TAB, CAP, etc.
Area	The area or region for which the summary totals are being displayed.
Class	The drug class description. For example, Nortriptyline.
No. of Prescriptions	The number of prescriptions administered during the specified period for the product, ingredient, strength, form, or area combination.
No. of Doses	The number of doses administered during the specified period for the product, ingredient, strength, form, area combination.

Printing Summary Information on Drug Usage

Procedure

Follow the steps in the table below to print summary information on drug usage.

Step	Action
1	From the main menu, click **+Prescription Analysis**.
2	Click **Search and Summarize Drug**s. **Result**: The Search & Summarize Drugs page appears. 
3	Modify the values, and then click the **Search** button. **Result**: A grid displays all the combinations that matched your search criteria.
4	Click the **Print** button to print the results. **Result**: A report displays in a Crystal Report Viewer.
5	You can: • Click the **Printer** icon to print the report. • Click the **Export** icon to export the results to a spreadsheet.

Chapter 15: Searching for Patients

Overview

Introduction

The Patient Search function allows you to search for patients based on the last name, first name, date of birth, and street address.

When a search is being performed using the Power Search option, PMP Manager recognizes certain elements as specific Power Search criteria. When this criterion is recognized, PMP Manager automatically defaults the operator value to = (equal to). Power Search criteria include the following values:

- Phone Number
- First Name
- Last Name
- Date of Birth
- Address
- Zip
- Gender

Note: The Gender value is an exception for the operator value. You can change the operator value on this element.

The Patient Search function allows you to select from the list of patients retrieved and create a Patient Prescription Utilization Report for a specific period.

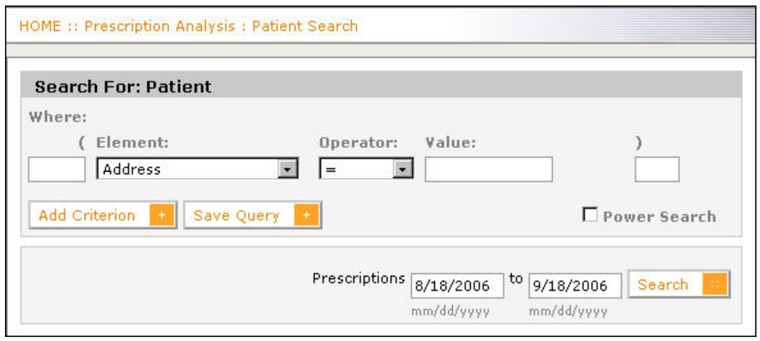
Contents

This chapter contains the following topics:

Searching for Patients

Procedure

Follow the steps in the table below to search for patients.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Prescription Analysis.</td></tr>
<tr><td>2</td><td>Click Patient Search.
Result: The Patient Search page appears.

</td></tr>
<tr><td>3</td><td>Enter the search criteria using the drop-down menus. You can search by last name, first name, date of birth, street address, drug name, drug ingredients, pharmacy NABP number, practitioner DEA number, pharmacy status, and practitioner status.
When a search is being performed using the Power Search option, PMP Manager recognizes certain elements as specific Power Search criteria. When this criterion is recognized, PMP Manager automatically defaults the operator value to = (equal to). Power Search criteria include the following values:

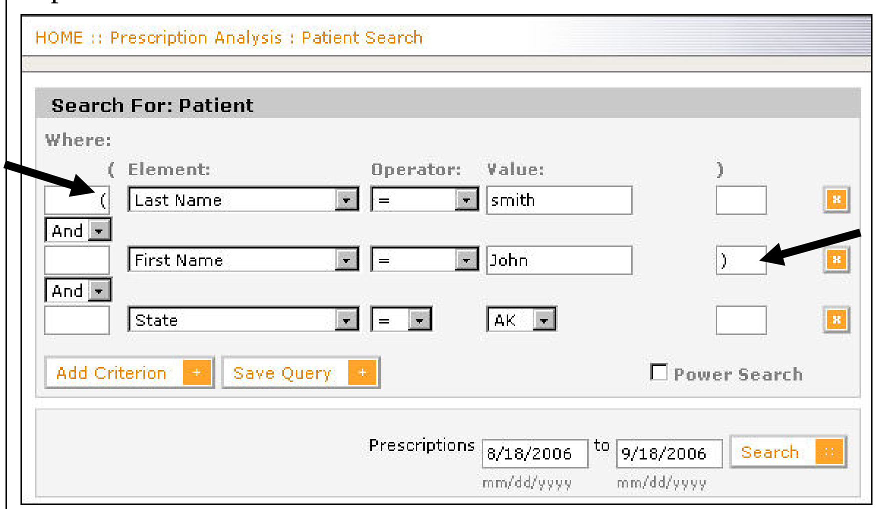
Phone Number
First Name
Last Name
Date of Birth
Address
Zip
Gender

Note: The Gender value is an exception for the operator value. You can change the operator value on this element.</td></tr>
<tr><td>4</td><td>From the Element drop-down menu, select the appropriate element that you want to search.</td></tr>
</table>

Continued on next page

Searching for Patients, Continued

Procedure (continued)

Step	Action
5	Select an operator from the **Operator** drop-down menu and specify a value.
6	If you want to search for several elements by using Boolean expressions, click the **Add Criterion** button and complete the information for each criterion.
7	From the drop-down menus between each phrase, select an **And** or **Or** operator.
8	To force the order of processing, type parentheses around the phrases that you want to process first. **Note**: Parentheses are used to force the order of processing. For example, if you surround the "And" phrases in your search with parentheses, the search engine processes this part of the search first and then combines this result with the last part of the search. By using this method, you are assured that the "And" terms are kept together as a logical unit. **Note**: Use multiple parentheses in a field to define nested logical expressions. 
9	Click the **Search** button. **Result**: The system displays a list of patients who matched the specified criteria.

Patient Search Page Descriptions

Patient Search Page Descriptions

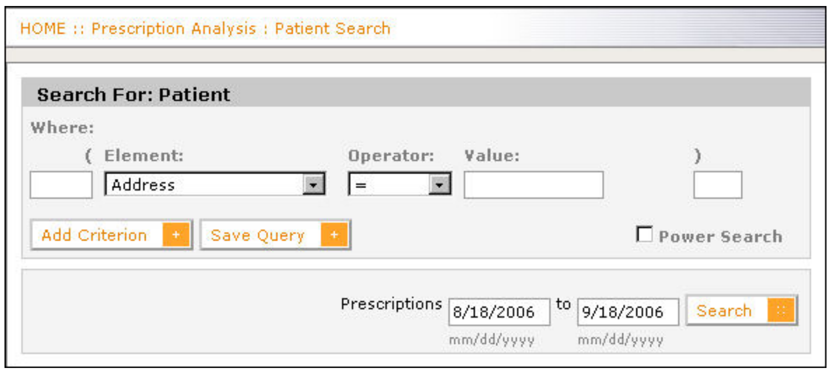
Field/Button	Description
Search For	
Open Parentheses	Type one or more open parentheses in this field to logical group search criteria.
Element	Select the element to search on – Last Name, First Name, Date Of Birth, and Address.
Operator	Select the relational operator for the search criteria.
Value	Type the value to be used in the search criteria.
Close Parentheses	Type one or more close parentheses in this field to logical group search criteria.
Add Criterion button	Add an additional criterion.
Download XML	Generate an XML document, which lists the prescriptions that satisfied your query.
Save Query button	Save your query so you do not have to retype the search criteria again. For more information, see "Using the Saved Query List function" on page 141.
Prescriptions	Start of date range for which prescriptions should be reported.
To	End of date range for which prescriptions should be reported.
Search Results	
<Check box>	Click the check box next to the patients you want to be included in the Patient Utilization Report.
First Name	The patient's first name.
Last Name	The patient's last name.
Date Of Birth	The patient's date of birth.
Address	The patient's street address.

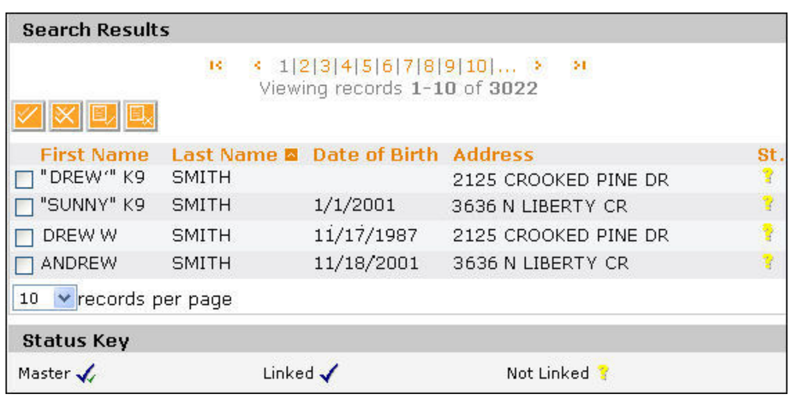
Creating a Patient Utilization Report for Patients

Procedure

Follow the steps in the table below to create a Patient Utilization Report for patients.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Prescription Analysis.</td></tr>
<tr><td>2</td><td>Click Patient Search.

Result: The Patient Search page appears.

</td></tr>
<tr><td>3</td><td>Enter the search criteria using the drop-down menus. You can search by last name, first name, date of birth, street address, drug name, drug ingredients, pharmacy NABP number, practitioner DEA number, pharmacy status, and practitioner status.</td></tr>
<tr><td>4</td><td>Click the Search button.

Result: A grid displays a list of patients who matched the specified search criteria.

</td></tr>
<tr><td>5</td><td>Click the check boxes next to the patients you want to process for the Patient Utilization Report.</td></tr>
</table>

Continued on next page

Creating a Patient Utilization Report for Patients, Continued

Procedure (continued)

Step	Action
6	Type a date range for the prescription. **Note**: If a date range is not indicated, then the system reports all the prescriptions for the selected patients.
7	Click the **View Report** button. **Result**: A report displays in a Crystal Report Viewer.
8	You can: • Click the **Printer** icon to print the report. • Click the **Export** icon to export the results to a spreadsheet.

Chapter 16: Searching for Practitioners

Overview

Introduction

The Practitioner Search function allows you to search for practitioner based on the last name, first name, date of birth, and street address. It allows you to select from the list of practitioners retrieved and create a Practitioner Prescription Utilization Report for a specific period.

Contents

This chapter contains the following topics:

Searching for Practitioners

Procedure

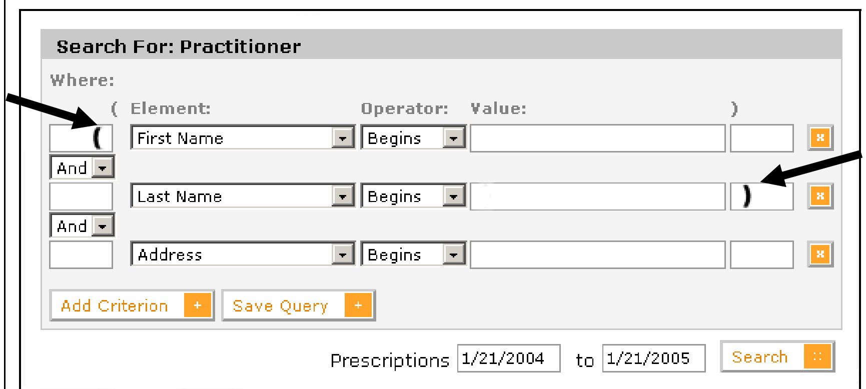
Follow the steps in the table below to search for practitioners.

Step	Action
1	From the main menu, click **+Prescription Analysis**.
2	Click **Practitioner Search**. **Result**: The Practitioner Search page appears. 
3	From the **Search For: Practitioner** area, select an element and operator and specify a value. **Note**: If you want to search for several elements by using Boolean expressions, click the **Add Criterion** button and complete the information for each criterion.
4	From the drop-down menus between each phrase, select an **And** or **Or** operator.

Continued on next page

Searching for Practitioners, Continued

Procedure (continued)

Step	Action
5	To force the order of processing, type parentheses around the phrases that you want to process first. **Notes**: Parentheses are used to force the order of processing. For example, if you surround the "And" phrases in your search with parentheses, the search engine processes this part of the search first and then combines this result with the last part of the search. By using this method, you are assured that the "And" terms are kept together as a logical unit. Use multiple parentheses in a field to define nested logical expressions. 
6	Click the **Search** button.
7	From the Search Results area, click the practitioner name that contains the data you are searching.
8	From the Practitioner Details page, you can view or modify and the practitioner's information. If you modify the practitioner information, click the **Save** button.

Practitioner Search Page Descriptions

Practitioner Search Page Descriptions

Field/Button	Description
Search For: Practitioner	
Element	A field within the segment that you have chosen.
Operator	Specifies a relationship between the element and its value.
Value	Defines the element that you are searching. **Note**: If a value belongs to a particular set, then the portal displays a drop-down. Otherwise, a text box appears.
And/Or drop-down menu	Specify whether phrases are joined using logical AND or OR expressions.
Add Criterion button	Add another phrase to your Boolean expression.
Save Query button	Save your query so you do not have to retype the search criteria again. For more information, see "Using the Saved Query List function" on page 141.
Prescriptions	Start of date range for which prescriptions should be reported.
To	End of date range for which prescriptions should be reported.
View Reports button	View a report of the prescriptions that satisfy the selected criteria.
Download XML	Generate an XML document, which lists the prescriptions that satisfied your query.
Search button	Execute your query.

Continued on next page

Practitioner Search Page Descriptions, Continued

Practitioner Search Page Descriptions (continued)

Field/Button	Description
Search Results	
<Check box>	Click the check box next to the practitioners you want to be included in the Patient Utilization Report.
First Name	The practitioner's first name.
Last Name	The practitioner's last name.
Mailing Name	The practitioner's mailing name.
Address	The practitioner's mailing address.
Status	The status of the practitioner's license, active, suspended, etc.

Practitioner Details Page Descriptions

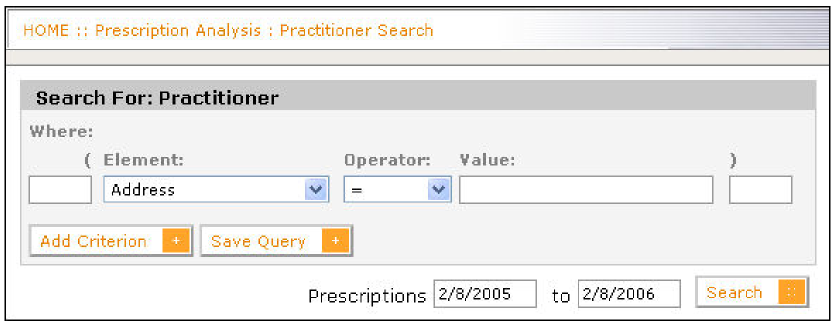
Practitioner Details Page Descriptions

Field/Button	Description
Practitioner Information	
Name (Last, First, Middle)	The practitioner's first, middle, and last name.
Mailing Address	The practitioner's mailing address.
Specialization	The practitioner's specialization.
DEA Number	The practitioner's DEA number.
Status	The practitioner's status.
Contact Information	
Address (Care of)	The care of business name where the practitioner practices.
Street	The pharmacy's street location.
City	The pharmacy's city location.
State	The pharmacy's state location.
Zip	The pharmacy's zip code.
Phone Number	The pharmacy's phone number.
Fax Number	The pharmacy's fax number.
Email	The practitioner's e-mail address.

Creating a Practitioner Utilization Report

Procedure

Follow the steps in the table below to create a Practitioner Utilization Report for practitioners.

Step	Action
1	From the main menu, click **+Prescription Analysis**.
2	Click **Practitioner Search**. **Result**: The Practitioner Search page appears. 
3	Enter the search criteria using the drop-down menus. You can search by last name, first name, date of birth, street address, drug name, drug ingredients, pharmacy NABP number, practitioner DEA number, pharmacy status, and practitioner status.
4	Click the **Search** button. **Result**: A grid displays a list of practitioner who matched the specified search criteria.
5	Click the check boxes next to the patients you want to process for the Practitioner Utilization Report.
6	Type a date range for the prescription. **Note**: If a date range is not indicated, then the system reports all the prescriptions for the selected practitioner.

Continued on next page

Creating a Practitioner Utilization Report, Continued

Procedure
(continued)

Step	Action
7	Click the **View Report** button. **Result**: A report displays in a Crystal Report Viewer.
8	You can: • Click the **Printer** icon to print the report. • Click the **Export** icon to export the results to a spreadsheet.

Chapter 17: Searching for Prescriptions

Overview

Introduction

The Prescription Search function allows you to search for prescriptions based on certain prescription related details such as patient last name, patient first name, date of birth, street address, practitioner DEA number, pharmacy NABP number, etc.

Contents

This chapter contains the following topics:

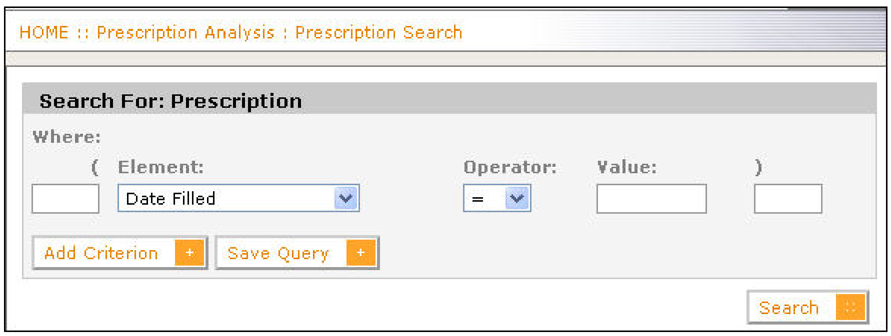
Searching for Prescriptions

Procedure

Follow the steps in the table below to search for prescriptions.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Prescription Analysis.</td></tr>
<tr><td>2</td><td>Click Prescription Search.

Result: The Prescription Search page appears.


</td></tr>
<tr><td>3</td><td>From the Search For: Prescription area, select an element and operator and specify a value.

Note: If you want to search for several elements by using Boolean expressions, click the Add Criterion button and complete the information for each criterion.</td></tr>
<tr><td>4</td><td>From the drop-down menus between each phrase, select an And or Or operator.</td></tr>
</table>

Continued on next page

Searching for Prescriptions, Continued

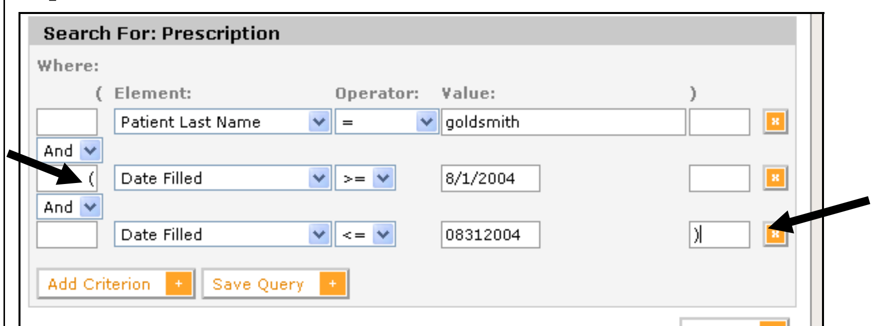
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>To force the order of processing, type parentheses around the phrases that you want to process first.

Notes:

Parentheses are used to force the order of processing. For example, if you surround the “And” phrases in your search with parentheses, the search engine processes this part of the search first and then combines this result with the last part of the search. By using this method, you are assured that the “And” terms are kept together as a logical unit.

Use multiple parentheses in a field to define nested logical expressions.


</td></tr>
<tr><td>6</td><td>Click the Search button.</td></tr>
<tr><td>7</td><td>From the Search Results area, click the prescription that you want to view the details of.</td></tr>
<tr><td>8</td><td>From the Prescription Details page, you can view or modify the prescription information. If you modify the prescription information, click the Save button.</td></tr>
</table>

Prescription Search Page Description

Prescription Search Page Description

Field/Button	Description
Search For: Practitioner	
Element	A field within the segment that you have chosen.
Operator	Specifies a relationship between the element and its value.
Value	Defines the element that you are searching. **Note**: If a value belongs to a particular set, then the portal displays a drop-down. Otherwise, a text box appears.
And/Or drop-down menu	Specify whether phrases are joined using logical AND or OR expressions.
Add Criterion button	Add another phrase to your Boolean expression.
Save Query button	Save your query so you do not have to retype the search criteria again. For more information, see “Using the Saved Query List function” on page 141.
Search button	Execute your query.

Reports and Saved Queries

Chapter 18: Generating Statistical Reports

Overview

Introduction

The Statistical Reports section allows you to generate reports that provide statistics on alerts, patient and practitioner requests, and prescriptions administered by pharmacies.

- **Alerts Report**: Provides statistics and summary information on a person and prescription alerts that have been posted.
- **Requests Report**: Provides statistics and summary information on patient and practitioner requests.
- **Monthly Stats for Pharmacies Report**: Allows you to view the prescriptions that were administered by a particular pharmacy or by all the pharmacies during a particular period. If this report is generated across several months, then it provides a statistical average of the prescriptions dispensed by the pharmacies.

Contents

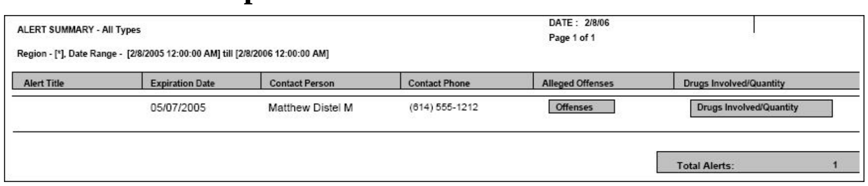
This chapter contains the following topics:

Viewing and Printing Alert Statistics

Procedure

Follow the steps in the table below to view and print alert statistics.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Reports.</td></tr>
<tr><td>2</td><td>Click Statistical.</td></tr>
<tr><td>3</td><td>Click Alerts.
Result: The Alert Report page appears.

</td></tr>
<tr><td>4</td><td>Select an alert type from the Alert Type drop-down menu. You can generate a report for alerts posted against persons, prescriptions, or both.</td></tr>
<tr><td>5</td><td>Select a region from the Region drop-down menu.</td></tr>
<tr><td>6</td><td>In the From Date and To Date fields, type the date range for which you want to generate for alerts.</td></tr>
<tr><td>7</td><td>Click the View Report button.

</td></tr>
<tr><td>8</td><td>Click the Print icon on the Crystal Report Viewer to print the report.</td></tr>
</table>

Alert Report Page Descriptions

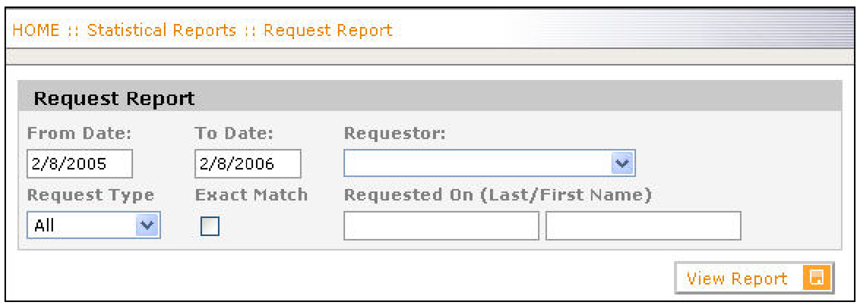
Alert Report Page Descriptions

Field/Button	Description
Alert Type	Report by alert type: • **All**: View person and prescription alerts. • **Person**: View person alerts. • **Prescription**: View prescription alerts.
Region	Report by region. The report lists all the regions specified in the system and provides an option that allows you to select all the regions.
From Date/To Date	Search for an alert type during this period.
View Report button	View the Alert Summary Report based on the criteria you entered.

Viewing and Printing Request Statistics

Procedure

Follow the steps in the table below to view and print request statistics.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Statistical**.
3	Click **Requests**. **Result**: The Request Report page appears. 
4	In the **From Date** and **To Date** fields, type the date range for which you want to search for reports.
5	In the **Requestor** drop-down menu, select a user name if you want to generate statistics on a specific user's requests.
6	Select a request type from the **Request Type** drop-down menu. You can report by patient, practitioner, or both.
7	Type the patient or practitioner's name in the **Requested On (Last/First Name)** field.
8	Click the **View Report** button. **Note**: To search for the name you requested and no wild card matching of that name, then click the **Exact Match** check box.
9	Click the **Print** icon on the Crystal Report Viewer to print the report.

Request Report Page Descriptions

Request Report Page Descriptions

Field/Button	Description
From Date/To Date	Report on requests during this time period.
Requestor	The name of the user whose requests should be reported.
Request Type	The type of request you want reported: • **Patient**: Report patient requests. • **Practitioner**: Report practitioner requests. • **All**: Report patient and practitioner requests.
Exact Match	Report requests for the name you typed in the **Requested On** field without any wild card matching.
Requested On (Last/First Name)	The name of the person you want to run a report on.
View Report button	View the Request Summary Report based on the criteria you entered.

Viewing and Printing Prescriptions Administered by Pharmacies

Procedure

Follow the steps in the table below to view and print prescriptions administered by a particular pharmacy during a particular period.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Statistical**.
3	Click **Monthly Stats for Pharmacies**. **Results**: The Monthly Stats for Pharmacies page appears. 
4	In the **From Date** and **To Date** fields, type the date range for the period in which prescriptions dispensed should be considered.
5	Type the name of the pharmacy in the **Pharmacy Name** field.
6	Click the **View Report** button.
7	Click the **Print** icon on the Crystal Report Viewer to print the report.

Monthly Stats for Pharmacies Page Descriptions

Monthly Stats for Pharmacies Page Descriptions

Field/Button	Description
From Date/To Date	Search the prescriptions administered by a particular pharmacy during this period.
Pharmacy Name	Report prescriptions administered by pharmacies whose name, which was typed in this field, matches a wild card search. **Note**: If this field was left blank, then all the pharmacies are reported.
View Report button	View the Monthly Stats by Pharmacies Report based on the criteria you entered.

Chapter 19: Generating Prescription Analysis Reports

Overview

Introduction

The Prescription Analysis Reports section allows you to generate analysis reports based on the following criteria: prescriptions administered by pharmacy, practitioner, product, and DEA schedule. It also allows you to search for the top 'X' practitioners who exceeded a certain number of prescriptions during a specified period. It also allows you to print a Patient Link Analysis Report to determine which patients could be linked.

- **Prescriptions by Pharmacies Report**: Allows you to view the prescriptions administered by a particular pharmacy during a particular period.
- **Prescriptions by Practitioners Report**: Allows you to view all the prescriptions prescribed by a practitioner during a particular period.
- **Prescriptions by Product Report**: Allows you to view a prescription that was administered during a particular period.
- **Prescriptions by DEA Schedule**: Allows you to view all the prescriptions of a certain DEA schedule during a particular period.
- **Patient Match Report**: Provides a list of patients that have common characteristics and could be the same person.
- **Top X Practitioner Report**: Provides a list of practitioners who administered more than the specified number of prescriptions.

Contents

This chapter contains the following topics:

Continued on next page

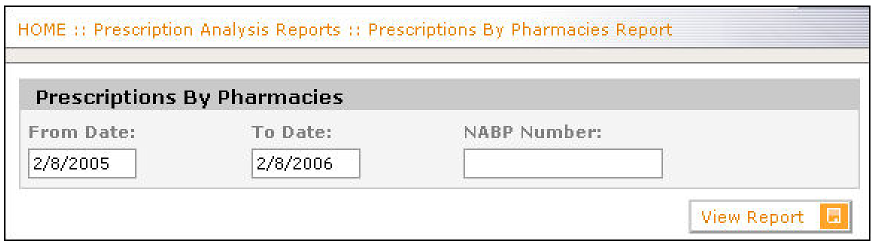
Overview, Continued

Contents (continued)

Viewing the Prescriptions by Pharmacies Report

Procedure

Follow the steps in the table below to view the Prescriptions by Pharmacies report.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Prescriptions by Pharmacies**. **Result**: The Prescriptions by Pharmacies Report page appears. 
4	In the **From Date** and **To Date** fields, type the date range for which you want to search for reports.
5	Type the NABP number of the pharmacy in the **NABP Number** field.
6	Click the **View Report** button.

Prescriptions by Pharmacies Report Page Descriptions

Prescriptions by Pharmacies Report Page Descriptions

Field/Button	Description
From Date/To Date	Report the prescriptions administered by a particular pharmacy during a particular period.
NABP Number	The NABP number of the pharmacy.
View Report button	View the Prescriptions by Pharmacies Report based on the criteria you entered.

Viewing the Prescriptions by Practitioners Report

Procedure

Follow the steps in the table below to view the Prescriptions by Practitioners report.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Prescriptions by Practitioners**. **Result**: The Prescriptions by Practitioners Report page appears. 
4	In the **From Date** and **To Date** fields, type the date range for which you want to search for reports. **Note**: To enable the date search function, click the **Y** radio button. To disable the date search function, click the **N** radio button.
5	Type the practitioner's DEA number in the **Practitioner ID** field.
6	Click the **View Report** button.

Prescriptions by Practitioners Report Page Descriptions

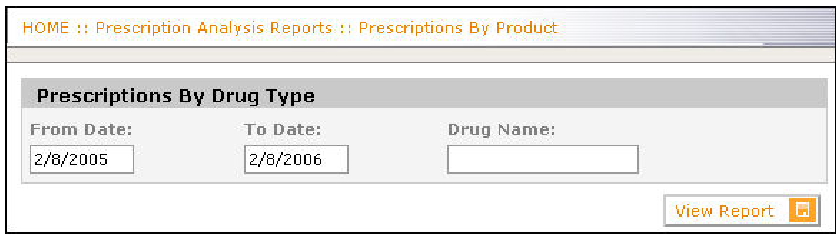
Prescriptions by Practitioners Report Page Description

Field/Button	Description
From Date/To Date	Report the prescriptions prescribed by a particular practitioner during a particular period.
Practitioner ID	The DEA number of the practitioner.
View Report button	View the Prescriptions by Practitioners Report based on the criteria you entered.

Viewing the Prescriptions by Product Report

Procedure

Follow the steps in the table below to view the Prescriptions by Product report.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Prescriptions by Product**. **Result**: The Prescriptions by Product page appears. 
4	In the **From Date** and **To Date** fields, type the date range for which you want to search for reports.
5	Type the product name in the **Drug Name** field.
6	Click the **View Reports** button.

Prescriptions by Product Report Page Descriptions

Prescriptions by Product Report Page Descriptions

Field/Button	Description
From Date/To Date	View the pharmacies that administered a particular drug during a particular period.
Drug Name	The name of the drug that you want to report prescriptions.
View Report button	View the Prescriptions by Product Report based on the criteria you entered.

Viewing the Prescriptions by DEA Schedule

Procedure

Follow the steps in the table below to view the Prescriptions by DEA Schedule.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Prescriptions by DEA Schedule**. **Result**: The Prescriptions by DEA Schedule page appears. 
4	In the **From Date** and **To Date** fields, type the date range for which you want to search for reports.
5	Type the DEA schedule for the products you want to view.
6	Click the **View Report** button.

Prescriptions by DEA Schedule Page Descriptions

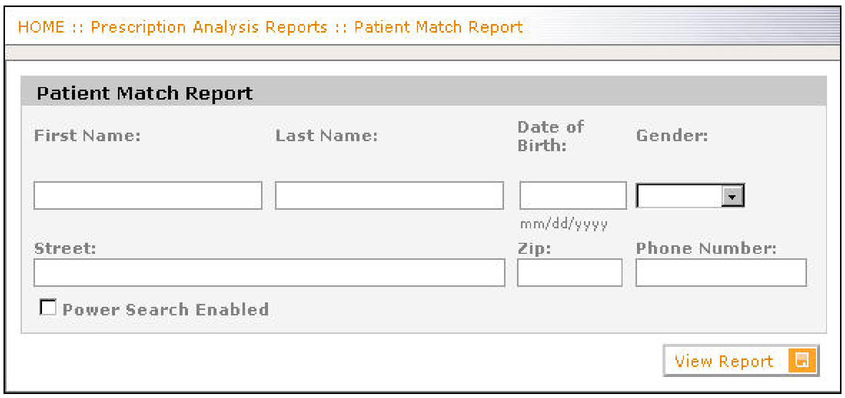
Prescriptions by DEA Schedule Page Descriptions

Field/Button	Description
From Date/To Date	View the prescriptions administered for all the products in a particular DEA schedule during a particular period.
DEA Schedule	The DEA schedule for the products you want to report prescriptions.
View Report button	View the prescriptions by DEA Schedule based on the criteria you entered.

Viewing the Patient Match Report

Procedure

Follow the steps in the table below to view the Patient Match report.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Patient Match Report**. **Result**: The Patient Match Report page appears. 
4	The Patient Match Report allows you to search by a patient's first name, last name, date of birth, or address and identify different patients who might be the same person. Click the radio button next to the criteria you want to use, and then type the relevant information.
5	If you provided the patient's first name or last name, then type his/her date of birth in the **DOB** field.
6	Click the **View Report** button.

Patient Match Report Page Descriptions

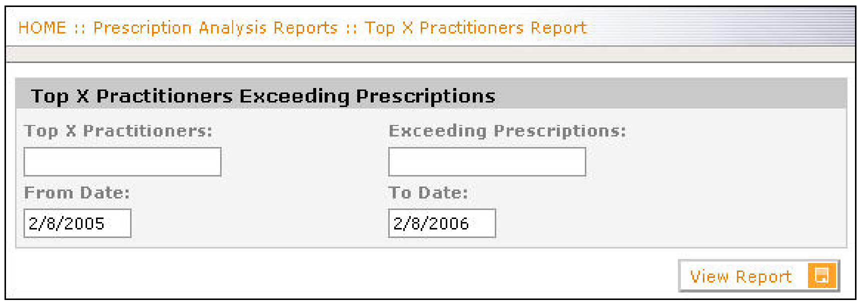
Patient Match Report Page Descriptions

Field/Button	Description
Radio button	Click the radio button next to the criteria you want to use to search for patients who can be linked and identified.
First Name	The patient’s first name.
Last Name	The patient’s last name.
DOB	The patient’s date of birth.
Address	The street name where the patient resides.
View Report button	View the Patient Match Report based on the criteria you entered.

Viewing the Top X Practitioner Report

Procedure

Follow the steps in the table below to view the Top X Practitioners Report.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Prescription Analysis**.
3	Click **Top X Practitioner Report**. **Result**: The Top X Practitioner Report page appears. 
4	In the **Top X Practitioners** field, type the number of practitioners who exceeded the specified number of prescriptions.
5	Type the prescriptions threshold number that you want to verify in the **Exceeding Prescriptions** field.
6	Type the duration which the practitioners should have exceeded the threshold in the **From Date** and **To Date** fields.
7	Click the **View Report** button.

Top X Practitioner Report Page Descriptions

Top X Practitioner Report Page Description

Field/Button	Description
Top X Practitioners	The maximum number of practitioners that you want displayed on the report.
Exceeding Prescriptions	Type the prescriptions threshold number that you want to verify.
From Date/To Date	The duration for which the number of prescriptions must be validated.
View Report button	View the Patient Link Analysis Report based on the criteria you entered.

Chapter 20: Viewing and Executing Saved Queries

Overview

Introduction

The Saved Query List function allows you to view and execute saved queries. This feature allows you to perform the query function without having to retype the required search criteria.

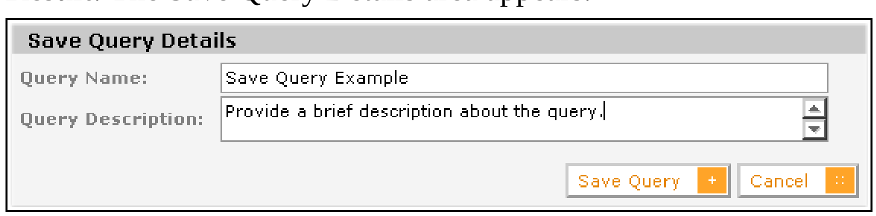
Contents

This chapter contains the following topics:

Saving a Query

Procedure

Follow the steps in the table below to save a query.

Step	Action
1	From the main menu, click **+Prescription Analysis**.
2	A query can be saved on the following types of searches: • Threshold Search • Patient Search • Practitioner Search • Prescriptions Search Click the link for the type of search you want to query. **Result**: The appropriate page appears. 
3	From the **Search For:** area, select an element and operator and specify a value. For more information on how to use the Patient or Practitioner Search function, see "Using the Patient Search function" on page 105 or "Using the Practitioner Search function" on page 111.
4	Click the **Save Query** button. **Result**: The Save Query Details area appears. 

Continued on next page

Saving a Query, Continued

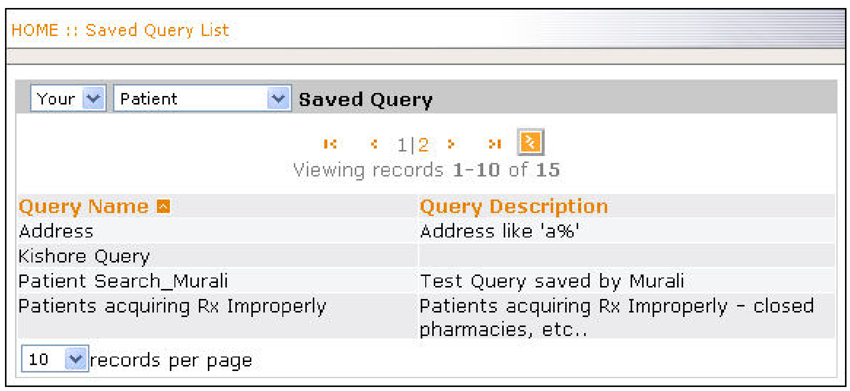
Procedure
(continued)

Step	Action
5	Type the query name in the **Query Name** field.
6	Type a brief description in the **Query Description** field.
7	Click the **Save Query** button.

Viewing and Executing Saved Queries

Procedure

Follow the steps in the table below to view and execute saved queries.

Step	Action
1	From the main menu, click **+Reports**.
2	Click **Saved Query List**. **Result**: The Saved Query list appears. **Note**: You can change the drop-down menus to display your queries or queries saved by others. You can also display patient or practitioner queries. 
3	Click the Query Name that you want to view or modify. **Result**: The appropriate page appears with the query you selected.
4	Modify the query if necessary and perform your search.

Saved Query List Descriptions

Saved Query List Descriptions

Field/Button	Description
Query Name	The name of the query.
Query Description	A brief description of the query.

End User Functions

Chapter 21: Requests

Overview

Introduction

Requests are a key feature of the PMP Manager. The Requests option gives you the ability to obtain utilization information on patients or prescription information on practitioners from the Administrator, depending on the profile that has been assigned to you. To maintain data security, PMP Manager users are not granted direct access to the data they need; instead, you initiate a Request to the Administrator, who runs the appropriate report on the data that is maintained and returns the results to you.

PMP Information Exchange

The PMP Information Exchange (PMIX) is an interface that works in conjunction with your local PMP. The PMIX interface is not visible to the PMP user. The interface extends the local PMP systems capability by making out-of-state prescription data available to the local PMP system.

The end user will have the option to select participating states when submitting a request. The participating states are predetermined by your administrator.

Note: Not all PMP users have PMIX functionality. If you have any questions, please contact your administrator.

Continued on next page

Overview, Continued

Contents

This chapter contains the following topics:

Understanding Supervisor User/Delegate User Relationships

Introduction

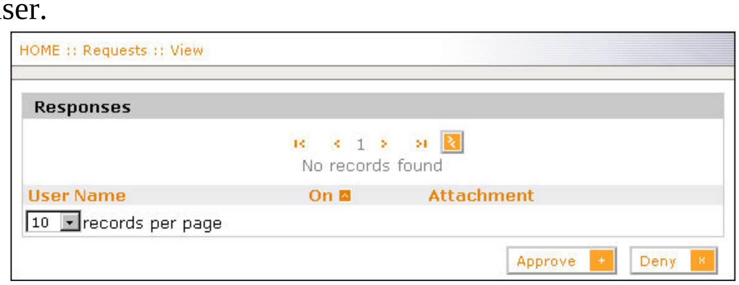
PMP supports different levels of authority and allows for a reporting structure. This reporting structure is created when the user account is created. The reporting structure allows for an individual to be designated as a supervisor user and have delegate users assigned to them.

This structure determines how requests that are submitted by delegate users are routed through the system and whether a request requires a supervisor's approval or not.

The supervisor/delegate relationship supports three different types of users:

- Supervisor user: A user who supervisors one or more delegate users. A supervisor user is responsible for their delegate user's actions. Requests submitted by a supervisor user follow the normal request flow. Requests sent by a supervisor user's delegates can be viewed on the Request View page under the Requests Sent by Delegates section. **Note**: Use the drop-down menu to select a particular delegate user or use the default value of **All** to see requests from all of your delegate users.
- Independent user: A user who is not a supervisor user or a delegate user and does not require supervision. Requests submitted by an independent user follow the normal request flow.
- Delegate user: A user who reports to one or more supervisors and may or may not require supervision.
  - A request that is submitted by a delegate user is seen by their assigned supervisor user.
  - A request that is submitted by a delegate user who requires supervision must be either approved or denied by a supervisor user
  - A request that is submitted by a delegate user who does not require supervision is seen by the supervisor user but is not approved or denied by the supervisor user.

The following image is an example of a portion of the Requests View page. The **Approve** and **Deny** button appear if the request has been submitted by a delegate user.



Viewing Requests

Introduction

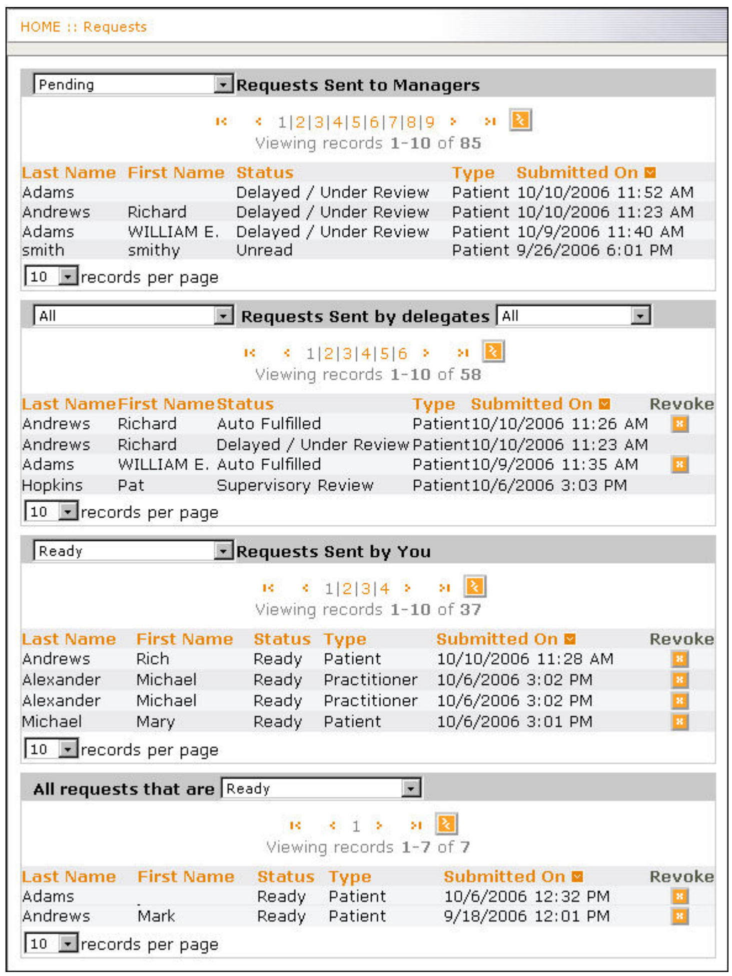
View Requests shows you the status of all requests that you have initiated or received.

Note: The Requests Sent by Delegates section only appears for a supervisor with delegate users.

Procedure

Follow the steps in the table below to view requests.

Step	Action
1	From the main menu, click **+Requests**.
2	Click **View**. **Result**: The Requests page appears.



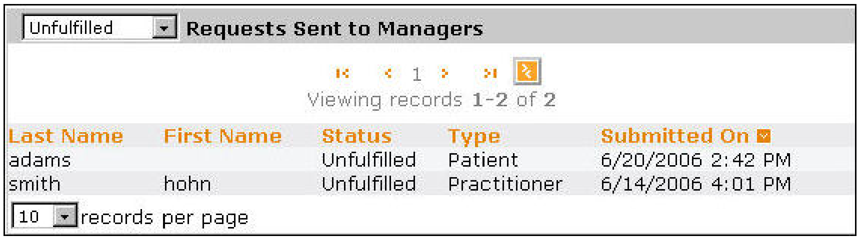
Continued on next page

Viewing Requests, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>From the drop-down menu, select the type of request that you want to view.

Result: All requests that correspond to the type that was selected appear in the grid.



Note: Click any of the column headers to sort the rows in the grid by the data in the column. An up or down arrow appears to show the order in the primary sort column.</td></tr>
</table>

Submitted Request Statuses

Introduction

The status of a submitted request changes throughout the fulfillment process. The status of a request is dependent on the following factors:

- Where it is in the fulfillment process.
- If it met the threshold values.
- If it requires supervisory attention.

During the fulfillment process a request can have any of the following statuses:

- **Unread**: The request has not been read.
- **Unfulfilled**: The request is unfulfilled.
- **Expired**: The request is expired.
- **Fulfilled**: The request has been fulfilled and is ready.
- **Delayed/Under Review**: The request is waiting for manual processing; the request exceeded the threshold values.
- **Auto Fulfilled**: The request has been automatically fulfilled; it met the threshold values and did not require supervisory review.
- **Supervisory Review**: The request has been submitted by a delegate user and is waiting for a supervisory review.
- **Supervisor Denied**: The request has been submitted by a delegate user and has been denied by a supervisor.
- **Responded**: The request has been submitted; the administrator has responded, but not fulfilled the request. The administrator may require more information on the request.
- **Revoked**: The request has been fulfilled but the Patient Rx History Report has been revoked by the administrator.
- **All**: View all of the requests.
- **Partially Fulfilled**: This status is only for PMIX enabled users. The request has been fulfilled by some, but not all, of the states.

Request Page Descriptions

Request Page Descriptions

Field/Button	Description
Requests Sent to Managers	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Unfulfilled • Expired • Fulfilled • Under Review • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or a practitioner.
Submitted On	Indicates the day and time the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Continued on next page

Request Page Descriptions, Continued

Request Page Descriptions (continued)

Field/Button	Description
Requests Sent by Delegates (This section only appears for a supervisor user with delegates.) **Note**: Use the drop-down menu to select a particular delegate user or use the default value of **All** to see requests from all of your delegate users.	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Unfulfilled • Expired • Fulfilled • Under Review • Auto Fulfilled • Supervisory Review • Supervisor Denied • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or a practitioner.
Submitted On	Indicates the day and time the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Continued on next page

Request Page Descriptions, Continued

Request Page Descriptions (continued)

Field/Button	Description
Requests Sent By You	
Drop-down Menu	View all your requests that have been responded to, not responded to, or expired. • Unread • Expired • Fulfilled • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or a practitioner.
Submitted On	Indicates the day and time the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Continued on next page

Request Page Descriptions, Continued

Request Page Descriptions (continued)

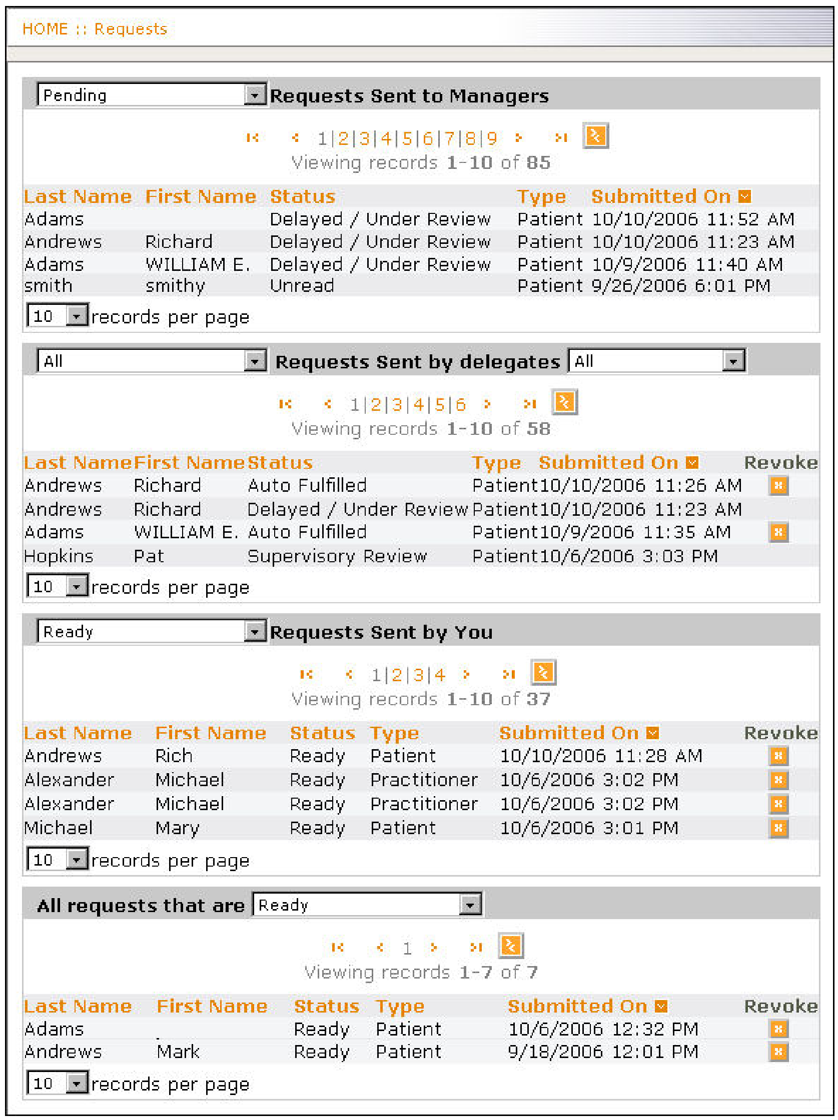
Field/Button	Description
All Requests that are	
Drop-down Menu	View all the requests that have been responded to, not responded to, or expired. • Unread • Expired • Fulfilled • Under Review. • Auto Fulfilled • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or a practitioner.
Submitted On	Indicates the day and time the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Viewing Request Details

Procedure

Follow the steps in the table below to view request details.

Step	Action
1	From the main menu, click **+Requests**.
2	Click **View**. **Result**: The Requests page appears.



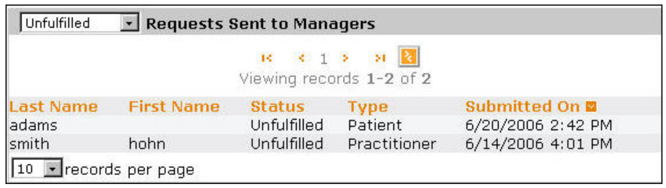
Continued on next page

Viewing Request Details, Continued

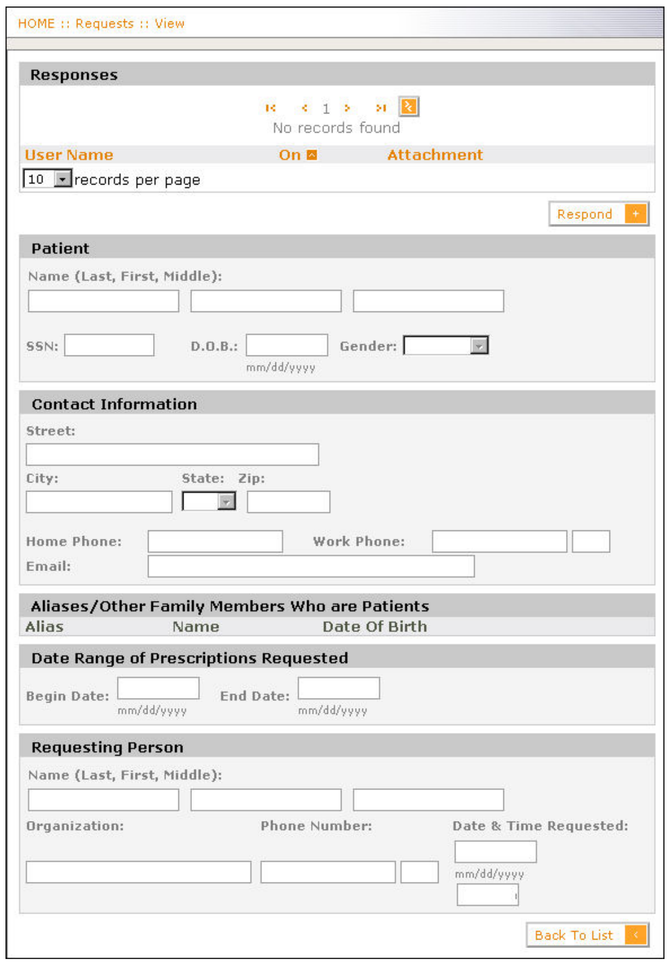
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>From the drop-down menu, select the type of request that you want to view.

Result: All requests that correspond to the type that was selected appear in the grid.


</td></tr>
<tr><td>4</td><td>Click the request row to view the details of the request.

Result: The View page appears.


</td></tr>
</table>

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Viewing Request Details, Continued

Responding to a Request

You can respond to a request you received (fulfilled or not) by clicking the **Respond** button. This action initiates the display of the **Response** field. Enter the text of your response and click **Save** to send it to the other party, such as an Administrator. If you decide not to send the response, click **Cancel** to return to the text of the request.

View Request Detail Page Descriptions

View Requests Detail Page Descriptions

Field/Button	Description
Responses (only appears if a response has been submitted)	
User Name	Name of the person who composed the response.
On	Date of the response.
Attachment	Any file attached to the response. This usually contains the request results.
Delete button	If you click this button, you can delete any response sent directly to you.
Current Response	The text of the current response selected from the Response data grid.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or the practitioner's name.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

View Request Detail Page Descriptions, Continued

View Requests Detail Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Name	The name of another family member who may have received similar prescriptions for whom the requestor wants information.
Date of Birth	The birth date of this family member.
Date Range of Prescriptions Requested	
Begin Date	The beginning date for the range of prescriptions requested from the Administrator.
End Date	The end date for the range of prescriptions requested from the Administrator.
Requesting Person Detail	
Name	The name of the person who requested the information.
Organization	The organization, if any, with which the requester is associated.
Phone Number	The telephone number where the requesting person can be reached.
Date/Time Reported	The date and time the request was initiated.

Requests Sent by You Section

Field/Button	Description
Requests Sent Type	Select the type of Requests Sent that you want to see using this drop-down menu.
Data Grid Column Headings	
Last Name	Last name of the subject of the request (patient or practitioner).
First Name	First name of the subject of the request (patient or practitioner).
Status	The status of the request.
Type	The type of request.
Submitted On	The date and time the request was submitted.

View Sent Request Detail Page Descriptions

View Sent Requests Detail Page Descriptions

Field/Button	Description
Responses (only appears if a response has been submitted)	
User Name	Name of the person who composed the response.
On	Date of the response.
Attachment	Any file attached to the response. This usually contains the request results.
Delete button	If you click this button, you can delete any response sent directly to you.
Current Response	The text of the current response selected from the Response data grid.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or the practitioner's name.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The first line of the street address or name of the person receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

View Sent Request Detail Page Descriptions, Continued

View Sent Requests Detail Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Name	The name of the family member of the patient whose prescriptions you are additionally requesting.
Date of Birth	The birth date of this family member.
Date Range of Prescriptions Requested	
Begin Date	Enter the beginning date for the range of prescriptions you are requesting from the database.
End Date	Enter the end date for the range of prescriptions you are requesting from the database.
Reporting Person Detail	
Name	The name of the person who reported the patient or practitioner.
Organization	The organization, if any, with which this person is associated.
Phone Number	The telephone number where the reporting person can be reached.
Date/Time Reported	The date and time the report was initiated.
Responses	
User Name	The name of the user or Administrator who composed the response.
On	The date and time of the response.
Attachment	The name of any attached file to the response. Click to download the file to your PC.
Current Response	
Response Text	The text of the displayed response.

Unsolicited Requests Received

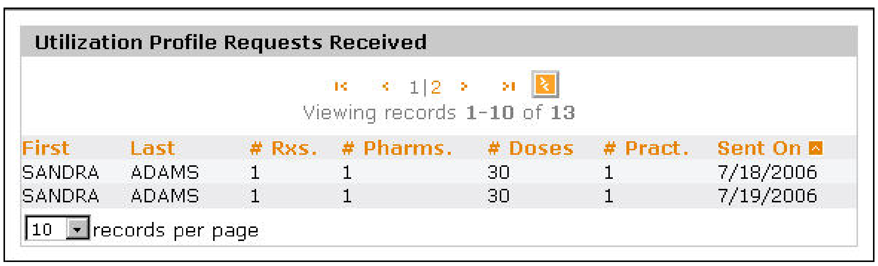
Introduction

Unsolicited Requests Received are sent to pharmacies and practitioners for a person that they have previously served. This unsolicited request informs the pharmacy or practitioner about prescription usage.

When a PMP administrator receives an unsolicited request, the system or the administrator fulfills the requests and then sends a cover letter and the patient utilization report to every practitioner and pharmacy on the report.

Procedure

Follow the steps in the table below to view your unsolicited requests received.

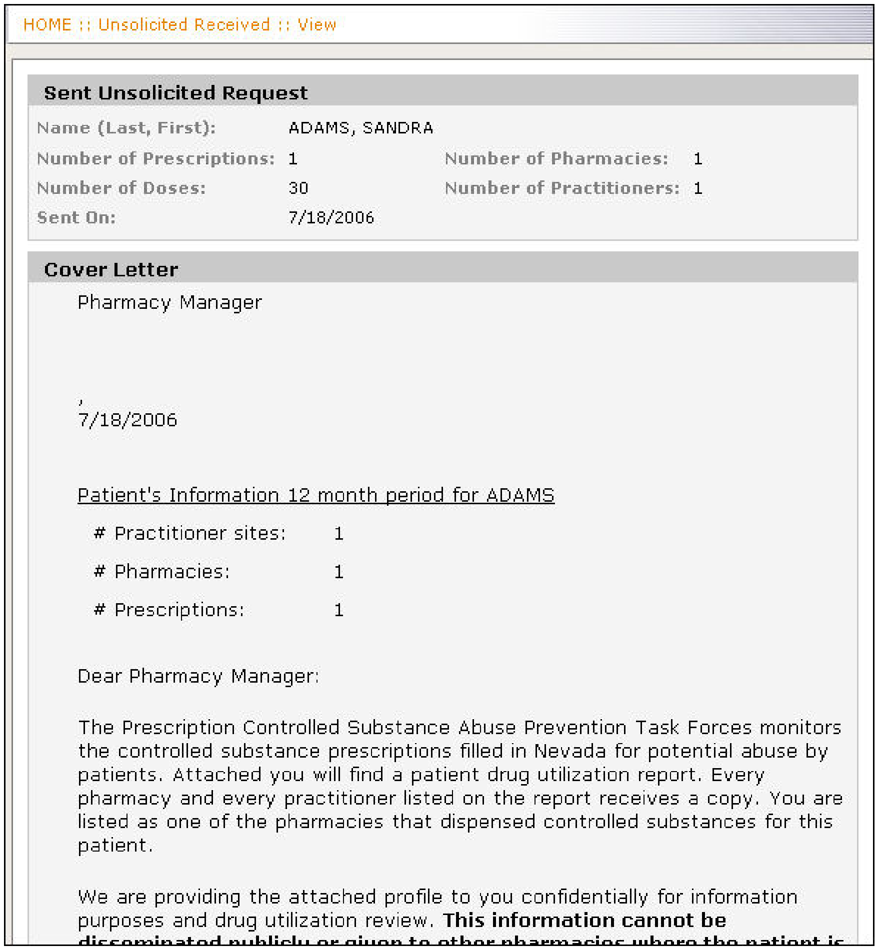
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Requests.</td></tr>
<tr><td>2</td><td>Click Unsolicited Received.
Result: The Unsolicited Requests Received page appears.

</td></tr>
</table>

Continued on next page

Unsolicited Requests Received, Continued

Procedure (continued)

Step	Action
3	Click on a patient in the data grid to view the cover letter.


HOME :: Unsolicited Received :: View

Sent Unsolicited Request

Name (Last, First): ADAMS, SANDRA
Number of Prescriptions: 1 Number of Pharmacies: 1
Number of Doses: 30 Number of Practitioners: 1
Sent On: 7/18/2006

Cover Letter

Pharmacy Manager

,
7/18/2006

Patient's Information 12 month period for ADAMS

\# Practitioner sites: 1

\# Pharmacies: 1

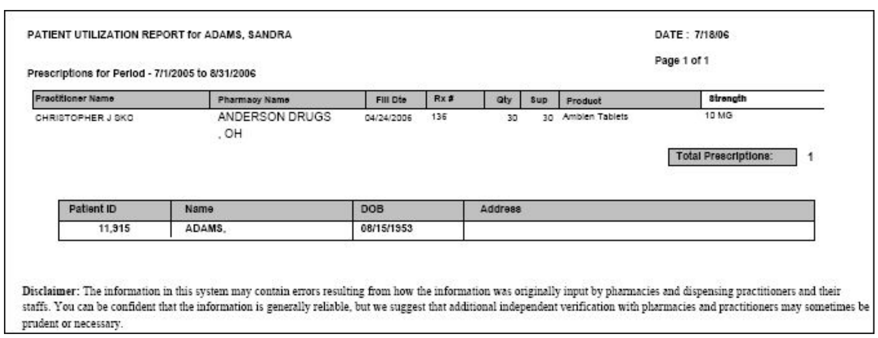
\# Prescriptions: 1

Dear Pharmacy Manager:

The Prescription Controlled Substance Abuse Prevention Task Forces monitors the controlled substance prescriptions filled in Nevada for potential abuse by patients. Attached you will find a patient drug utilization report. Every pharmacy and every practitioner listed on the report receives a copy. You are listed as one of the pharmacies that dispensed controlled substances for this patient.

We are providing the attached profile to you confidentially for information purposes and drug utilization review. **This information cannot be disseminated publicly or given to other pharmacies where the patient is**

Step	Action
4	Click the **View Report** button to view the Patient Utilization Report.


PATIENT UTILIZATION REPORT for ADAMS, SANDRA DATE : 7/18/06

Page 1 of 1

Prescriptions for Period - 7/1/2005 to 8/31/2006

Practitioner Name	Pharmacy Name	Fill Dte	Rx #	Qty	Sup	Product	Strength
CHRISTOPHER J SKO	ANDERSON DRUGS , OH	04/24/2006	136	30	30	Ambien Tablets	10 MG

Total Prescriptions: 1

Patient ID	Name	DOB	Address
11,915	ADAMS,	08/15/1953	

Disclaimer: The information in this system may contain errors resulting from how the information was originally input by pharmacies and dispensing practitioners and their staffs. You can be confident that the information is generally reliable, but we suggest that additional independent verification with pharmacies and practitioners may sometimes be prudent or necessary.

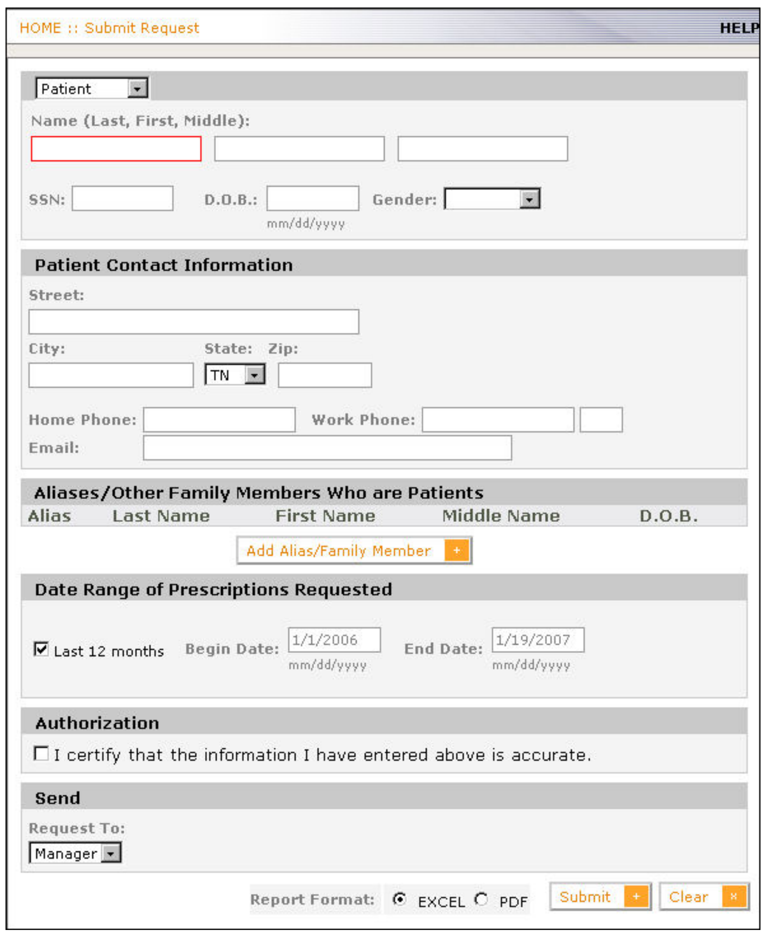
Submit Requests

Introduction

The Submit Requests option provides the ability to enter requests to the Administrator for patient or practitioner reports. These reports are actually queries against the database that generate a set of prescription data based on the name and/or aliases.

Procedure

Follow the steps in the table below to submit a request.

Step	Action
1	From the main menu, click **+Requests**.
2	Click **Submit**. **Result**: The Submit Request page appears. 

Continued on next page

Submit Requests, Continued

Procedure (continued)

Step	Action
3	From the drop-down menu, select the request type, Patient or Practitioner. **Note**: If Practitioner is not a value that is available, that you are not approved for practitioner inquires.
4	Complete as much identifying information as you can on the patient or practitioner. The more information you include, the more accurately this person can be identified in the database.
5	Check the **Authorization** box at the end of the form. **Note**: The Request will not be submitted without authorization.
6	Click **Submit** to send the Request to the Administrator.
7	Click **Clear** to remove all data and start over.

Submit Request Details Page Descriptions

Submit Request Details Page Descriptions

Field/Button	Description
Request Type	In the heading, select the type of request you are submitting.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or practitioner's name that issued the prescriptions, in Last, First, Middle format.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

Submit Request Details Page Descriptions, Continued

Submit Request Details Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Add Family Member button	Click this button to add a family member who has also received similar prescriptions.
Name	Enter the family member's name, in Last, First Middle format.
Date of Birth	Enter the birth date of this family member.
Date Range of Prescriptions Requested	
Last 12 Months	Check this box to auto-fill the date range with values reflecting a range that begins on the first of the 12th full month prior to the current date and ending today. **Example**: A date range completed on February 10, 2004, the auto-fill Begin Date is February 1, 2003 and the auto-fill End Date is February 10, 2004.
Begin Date	Enter the beginning date for the range of prescriptions.
End Date	Enter the end date for the range of prescriptions.
Authorization	
Authorization Check Box	Check this box to authorize the request. This is required to initiate the request; the Administrator will not process it without authorization.
Submit button	Click **Submit** to enter the request and send it to the Administrator.
Clear button	Click **Clear** to delete all input and begin again.
Send	
Request To	Drop-down menu that allows the user to specify that this is a request to multiple users.
Regions	Select the region.
All	Select this box if the request should be sent to all users in all the regions that were selected.
Users	Select all the users the request should be sent to (if All was not selected).

Submit Request/PMIX Enabled

Introduction

The PMP Information Exchange (PMIX) is an interface that works in conjunction with your local PMP. The PMIX interface is not visible to the PMP user. The interface extends the local PMP systems capability by making out-of-state prescription data available to the local PMP system.

The end user will have the option to select participating states when submitting a request. The participating states are predetermined by your administrator.

Note: Not all PMP users have PMIX functionality. If you have any questions, please contact your administrator.

The Submit Requests option provides the ability to enter requests to the Administrator for patient or practitioner reports. These reports are actually queries against the database that generate a set of prescription data based on the name and/or aliases. These requests can be sent to participating states that have been predetermined by your administrator.

Procedure

Follow the steps in the table below to submit a request.

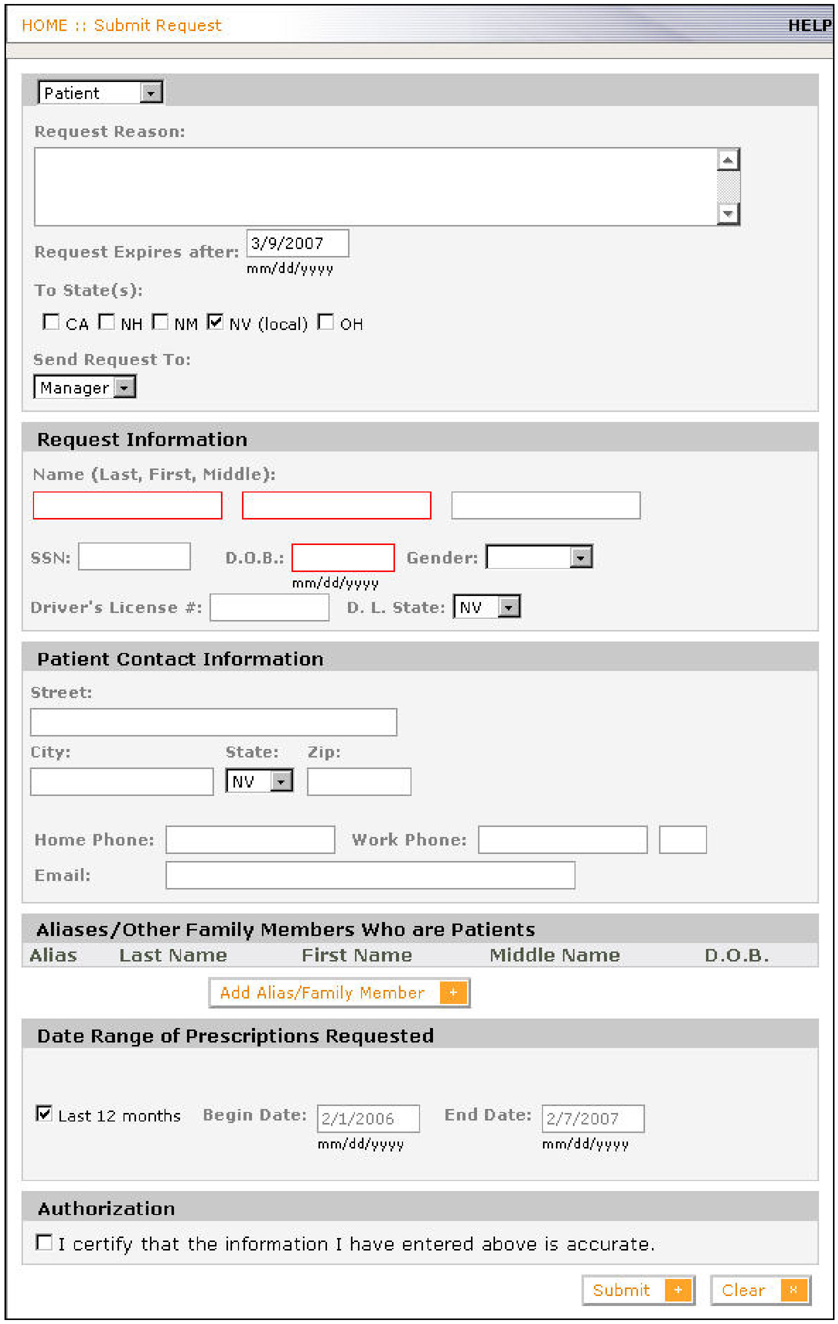
Step	Action
1	From the main menu, click **+Requests**.

Continued on next page

Submit Request/PMIX Enabled, Continued

Procedure (continued)

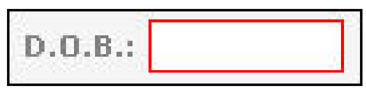
Step	Action
2	Click **Submit**. **Result**: The Submit Request page appears.



Continued on next page

Submit Request/PMIX Enabled, Continued

Procedure (continued)

Step	Action
3	From the drop-down menu, select the request type. Patient or Practitioner. **Note**: If Practitioner is not a value that is available, then you are not approved for practitioner inquiries.
4	In the **Request Reason** text box, enter the reason for this request.
5	Select the state(s) that you want to submit this request to. **Note**: Different states may have different field requirements on the rest of this form. If you choose a state that has specific requirements, the field will have a red border around it to indicate that this is a required field. Example: California may require the date of birth on this form, or Ohio may require a street address. When you select the state, PMP applies a red border around the field. 
6	Complete as much identifying information as you can on the patient or practitioner. The more information you include, the more accurately this person can be identified in the database.
7	Check the **Authorization** box at the end of the form. **Note**: The Request will not be submitted without authorization.
8	Click **Submit** to send the Request to the Administrator.
9	Click **Clear** to remove all data and start over.

Submit Request/PMIX Enabled Page Descriptions

Submit Request/PMIX Enabled Page Descriptions

Field/Button	Description
Request Type	In the heading, select the type of request you are submitting.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or practitioner's name that issued the prescriptions, in Last, First, Middle format.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Driver's License #	Enter the patient driver's license number. (Does not appear for practitioner.)
D.L. State	Enter state of the driver's license. (Does not appear for practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

Submit Request/PMIX Enabled Page Descriptions, Continued

Submit Request/PMIX Enabled Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Add Family Member button	Click this button to add a family member who has also received similar prescriptions.
Name	Enter the family member's name, in Last, First Middle format.
Date of Birth	Enter the birth date of this family member.
Date Range of Prescriptions Requested	
Last 12 Months	Check this box to auto-fill the date range with values reflecting a range that begins on the first of the 12th full month prior to the current date and ending today. **Example**: A date range completed on February 10, 2004, the auto-fill Begin Date is February 1, 2003 and the auto-fill End Date is February 10, 2004.
Begin Date	Enter the beginning date for the range of prescriptions.
End Date	Enter the end date for the range of prescriptions.
Authorization	
Authorization Check Box	Check this box to authorize the request. This is required to initiate the request; the Administrator will not process it without authorization.
Submit button	Click **Submit** to enter the request and send it to the Administrator.
Clear button	Click **Clear** to delete all input and begin again.
Send	
Request To	Drop-down menu that allows the user to specify that this is a request to multiple users.
Regions	Select the region.
All	Select this box if the request should be sent to all users in all the regions that were selected.
Users	Select all the users the request should be sent to (if All was not selected).

Chapter 22: Alerts

Overview

Introduction

Alerts are another key feature. The Alerts option gives you the capability to view and initiate warnings on particular persons suspected of prescription drug abuse in your area. The warnings are posted to every user within the specific geographic area targeted by the Alert. They can then be printed out and the poster displayed within the pharmacy or practitioner's office to notify all staff. This is an important preventive measure that gives maximum exposure to the information in minimal time.

While outstanding Alerts are displayed on the Home Page, more detail is available for view using the Alerts function on the Main Menu. You can even view expired alerts that you initiated.

Contents

This chapter contains the following topics:

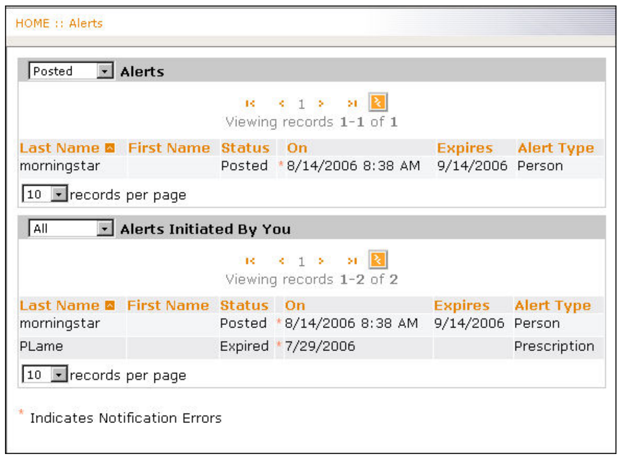
Viewing Alerts

Introduction

View Alerts shows you the status of all outstanding posted alerts as well as alerts that you have initiated.

Procedure

Follow the steps in the table below to view alerts.

Step	Action
1	From the main menu, click **+Alerts**.
2	Click **View Alerts**. **Result**: The View Alerts page appears.  **Note**: All posted Alerts that are in your queue appear as the top grid on the page. These are alerts that may be sent directly to you, to all users in your region or to all users in the system.
3	Click a row in the grid to see the alert detail. **Notes**: • To narrow or widen the types of alerts seen in the Alerts Initiated by You grid, change the option in the drop-down menu. The alerts that appear change accordingly. • No changes can be made to the alert information, but you can print it out for posting by clicking the **Print Preview** button and then the **Print** button. • Click on any of the column headers to sort the rows in the grid by the data in the column. An up or down arrow appears to show the order in the primary sort column.

Alerts Page Description

Alerts Page Description

Field/Button	Description
Posted Alerts section	
Last Name	Last name of the suspected person.
First Name	First name of the suspected person.
Posted On	The date and time the alert was posted.
Expires	The date and time the alert message expires.
Alert Type	The type of alert – person/ prescription.
Alerts Initiated by You section	
Alerts Sent Type	Select the type of Alerts Sent that you want to see using this drop-down menu.
Listed Alert Column Headings	
Last Name	Last name of the suspect.
First Name	First name of the suspect.
Status	The status of the alert: submitted, posted, rejected or expired.
On	The date and time the alert was posted.
Expires	The date and time the alert expires.
Alert Type	The type of alert – person/ prescription.

Person Alert Details Page Descriptions

Person Alert Details Page Descriptions

Field/Button	Description
Print Preview button	Click the **Print Preview** button to open the Print Preview, which generates a poster of the alert. From there, click the **Print** button to print the poster.
Alerts History	
Status	Shows the history of the alert, when it was submitted and posted.
On	This field shows when this particular status took effect.
By	The person who submitted, posted (approved) or responded to the alert.
Text	The first several words of the response text are displayed. If there is no response on the alert, the column does not appear.
Responding to the Alert	
Respond button	Click **Respond** to open the **Respond** field and enter a response to the alert.
Text	Enter the text of your response to the alert.
Save button	Click **Save** to post the response. It appears immediately in the Alert History section of the current alert.
Cancel button	Click **Cancel** to delete all changes and return to the original alert.
Person	
Name	The name of the person who received the prescriptions, in Last, First, Middle format.
Aliases	Any known aliases the person is using.
SSN	The Social Security Number of the person.
DL#	The person's driver's license number.
DL State	The state that issued the person's driver license.
Age	The person's age or range of possible ages.
Date of Birth	The person's birth date.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
Description	
Sex	The person's gender.
Race	The person's race.
Hair Color	The hair color of the person.
Eye Color	The eye color of the person.
Height Range	The actual height (recorded in the first space) or potential height range of the person.
Weight Range	The actual weight (recorded in the first space) or potential weight range of the person.
Physical Description	A physical description of the person, excluding the factors listed above.
Photograph or Sketch	A photograph or sketch of the person (scanned or electronically generated) may be attached to the alert to provide a picture to aid recognition. This section only appears if an image is available.
Address	
Address (Care of)	The street address or name of the other person who receives mail for the suspect.
Street	The second line of the street address, if needed.
City	The city where the person resides.
State	The state where the person resides.
Zip	The zip code for the person address.
Home Phone	The person's home phone number.
Work Phone	The person's work phone number.
Vehicle	
Year	The vehicle year of manufacture.
Make	The vehicle make.
Model	The vehicle model.
Style	The vehicle style.
Color	The color of the vehicle.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
License Plate Number	The plate number seen on the vehicle.
Plate State	The state displayed on the license plate.
Suspected Activity	
Alterations	This box is checked if altered prescriptions are suspected.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	This box is checked if prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	This box is checked if prescription drugs were dispensed and the blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	This box is checked if the prescription was forged.
Drugs Involved	
Drug	The suspected prescription drug being abused.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Comments	
Comment Text	Any comments that are associated with this alert are entered.
Contact	
Name	The last, first and middle name of the person who is the contact for the alert.
Organization	The organization with which the contact is associated.
Phone Number	The contact’s telephone number.
Alert Post Info	
Posted Alert Expires On	The expiration date for the alert.
Post to Region(s)	The regions to which this alert posted.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
View Broadcast Errors button	If you originated the alert and not all messages were broadcast due to errors in e-mail addresses or fax numbers, click this button to view the errors.
Save button	Click **Save** to save the response.
Cancel button	Click **Cancel** to cancel the changes.

Prescription Alert Details Page Descriptions

Prescription Alert Details Page Descriptions

Field/Button	Description
Print Preview button	Click the **Print Preview** button to open the Print Preview, which generates a poster of the alert. From there, click the **Print** button to print the poster.
Alert History	
Status	Shows the history of the alert, when it was submitted and posted.
On	This field shows when this particular status took effect.
By	The person who submitted, posted (approved) or responded to the alert.
Text	The first several words of the response text are displayed. If there is no response on the alert, the column does not appear.
Responding to an Alert	
Respond button	Click the **Respond** button to open the **Respond** field and enter a response to the alert.
Text	Enter the text of your response to the alert.
Save button	Click **Save** to post the response. It appears immediately in the Alert History section of the current alert.
Cancel button	Click **Cancel** to delete all changes and return to the original alert.
Prescription Detail	
Rx #	The prescription number on the prescription.
Pharmacy Detail	
Pharmacy Name	The name of the pharmacy.
Store #	The store number of the pharmacy.
Manager Name	The name of the pharmacy's manager.
Address (Care of)	The care of address of the pharmacy.
Street	The street address of the pharmacy.
City	The city of the pharmacy.
State	The state of the pharmacy.

Continued on next page

Prescription Alert Details Page Descriptions, Continued

Prescription Alert Details Page Descriptions (continued)

Field/Button	Description
Zip	The zip code of the pharmacy.
Phone Number	The phone number of the pharmacy.
Fax Number	The fax number of the pharmacy.
Reported By	
Name	The name of the person reporting the prescription.
Position	The position of the person reporting the prescription.
Phone Number	The phone number for the person reporting the prescription.
Fax Number	The fax number for the person reporting the prescription.
Caller Detail	
Name	The name of the caller for the prescription.
Position	The position of the caller for the prescription.
Patient Detail	
Name	The name of the patient on the prescription.
Address (Care of)	The care of address of the patient.
Street	The street address of the patient.
City	The city of the patient.
State	The state of the patient.
Zip	The zip code of the patient.
Phone Number	The phone number of the patient.
DOB	The date of birth of the patient.
Practitioner Detail	
Name	The name of the practitioner on the prescription.
DEA #	The DEA number of the practitioner.
Address (Care of)	The care of address of the practitioner.
Street	The street address of the practitioner.
City	The city of the practitioner.

Continued on next page

Prescription Alert Details Page Descriptions, Continued

Prescription Alert Details Page Descriptions (continued)

Field/Button	Description
State	The state of the practitioner.
Zip	The zip code of the practitioner.
Phone Number	The phone number of the practitioner.
Suspected Activity	
Alterations	This box is checked if altered prescriptions are suspected.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	This box is checked if prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	This box is checked if prescription drugs were dispensed and the blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	This box is checked if the prescription was forged.
Drugs Involved	
Drug	The drug that was prescribed.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Date Filled	The date the drug was dispensed by the pharmacy.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to Initiator, but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator's telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

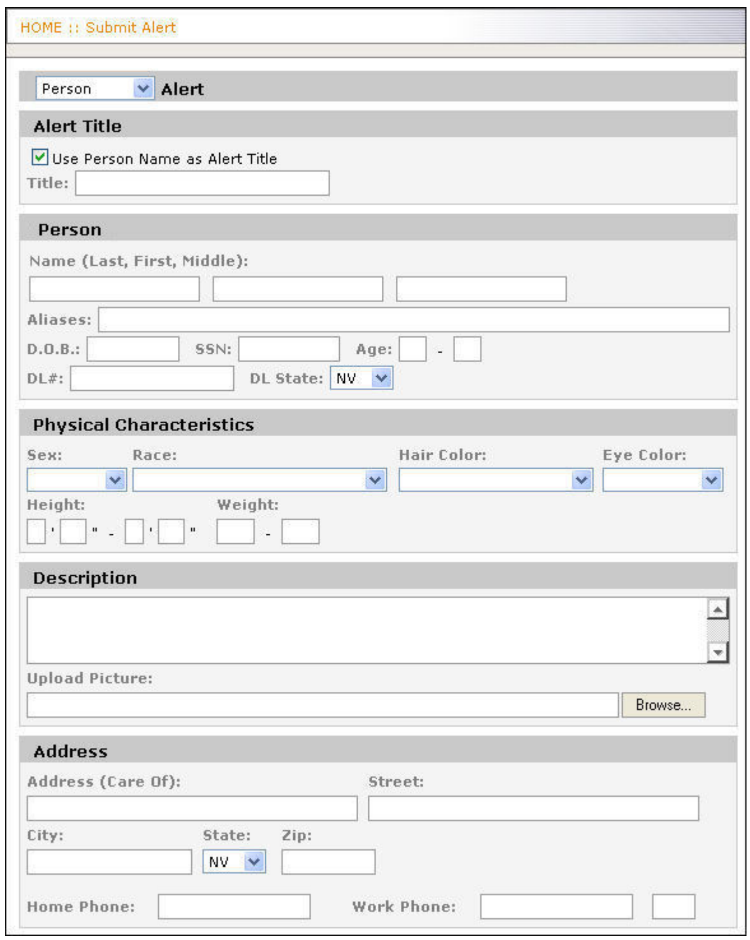
Submitting Person Alerts

Introduction

The Submit Alerts option provides the ability to enter alerts for the Administrator to distribute to other users of the system, perhaps within pre-defined regions.

Procedure

Follow the steps in the table below to submit a person alert.

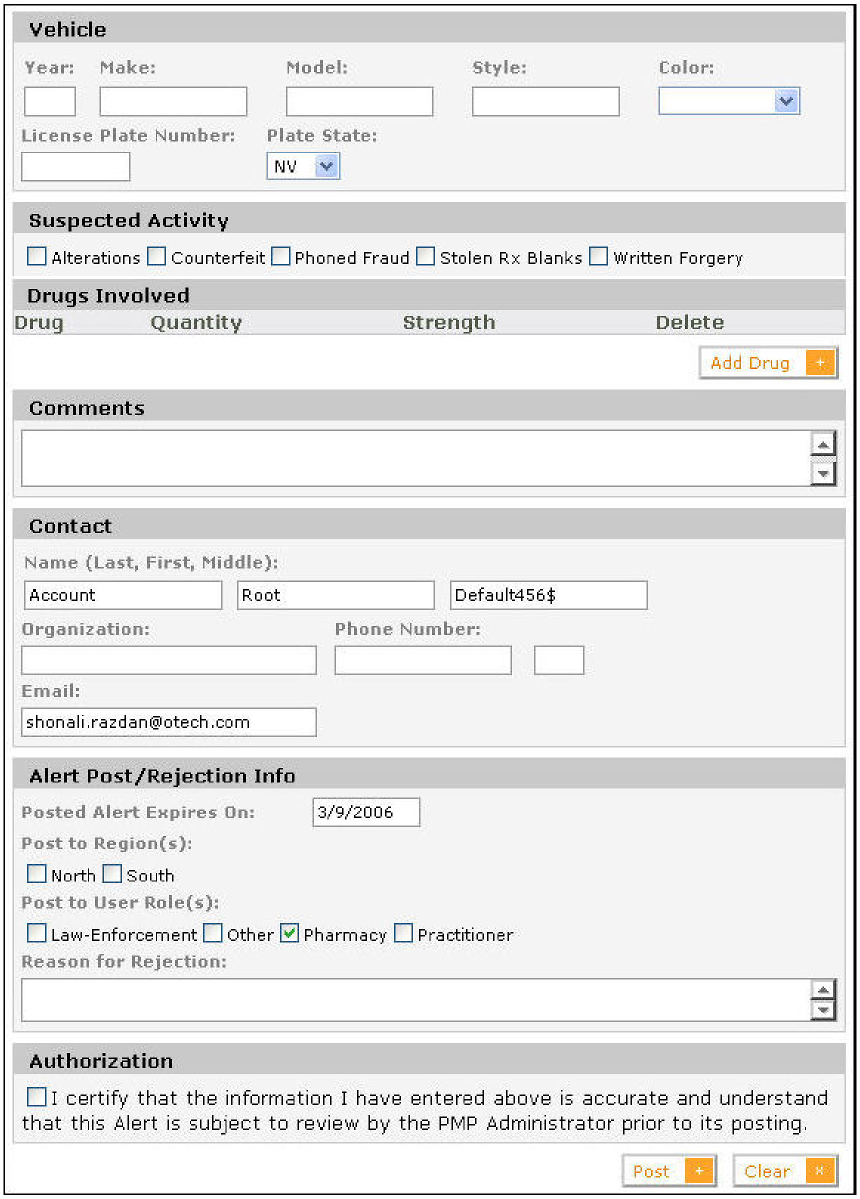
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Alerts.</td></tr>
<tr><td>2</td><td>Click Submit.
Result: The Submit Alerts page appears.

</td></tr>
</table>

Continued on next page

Submitting Person Alerts, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Image continued



Vehicle

Year: Make: Model: Style: Color:

License Plate Number: Plate State: NV

Suspected Activity

Alterations Counterfeit Phoned Fraud Stolen Rx Blanks Written Forgery

Drugs Involved

Drug Quantity Strength Delete

Add Drug

Comments

Contact

Name (Last, First, Middle): Account Root Default456$

Organization: Phone Number:

Email: shonali.razdan@otech.com

Alert Post/Rejection Info

Posted Alert Expires On: 3/9/2006

Post to Region(s):

North South

Post to User Role(s):

Law-Enforcement Other Pharmacy Practitioner

Reason for Rejection:

Authorization

I certify that the information I have entered above is accurate and understand that this Alert is subject to review by the PMP Administrator prior to its posting.

Post Clear</td></tr>
<tr><td>4</td><td>From the Alert drop-down menu click Person.</td></tr>
</table>

Continued on next page

Submitting Person Alerts, Continued

Procedure (continued)

Step	Action
5	Click **Person Name as Alert Title**. **Note**: If you wish to enter a different title, click the box. You can then enter a different Alert Title.
6	Enter the Person Name and Physical Description information. Do not add an image at this time – complete all keyed input first.
7	Click **Add Drug** to list the drugs that the person is suspected of obtaining illegally. **Note**: If you need to add another drug, click the button again.
8	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
9	If you have access to a picture of the person, click the **Browse** button above, next to the Description, and select the appropriate picture file.
10	The Contact data is defaulted to your information, taken from the My Account form. This can be changed if necessary.
11	Click **Submit** to send the Alert to the Administrator for approval and distribution.
12	Click **Clear** to remove all data and start over.

Submit Alerts for Person Page Descriptions

Submit Alerts for Person Page Descriptions

Field/Button	Description
Alert Title	
Use Person Name as Alert Title	This box is checked by default and triggers using the person name as the title of the alert to be displayed in the Posted Alerts list. Only clear the box if you want to enter a different title.
Title	Enter a new title for the alert if you cleared the Use Person Name as Alert title box. **Note**: The title only appears at the top of the Alert page – it is not used in any of the Alert Data Grids. However, this space can be used to highlight information such as “Wanted”, “Armed and Dangerous”, “Reward”, or other notification that should not be buried in the text of the alert.
Person Detail	
Name	The name of the person who received the prescriptions or the name of the practitioner who issued the prescriptions.
Aliases	Any known aliases the person uses.
SSN	The Social Security Number of the person.
DL#	The person’s driver’s license number.
Age	The person’s age or possible age range.
Date of Birth	The person’s birth date.
Description	
Sex	The person’s gender.
Race	The person’s race.
Hair Color	The hair color of the person.
Eye Color	The eye color of the person.
Height Range	The actual height (recorded in the first space) or potential height range of the person.
Weight Range	The actual weight (recorded in the first space) or potential weight range of the person.

Continued on next page

Submit Alerts for Person Page Descriptions, Continued

Submit Alerts for Person Page Descriptions (continued)

Field/Button	Description
Physical Description	A physical description of the person, excluding the factors outlined above.
Photograph or Other Image	A photograph or sketch of the person (scanned or electronically generated) may be attached to the alert to provide a picture to aid recognition. Click the **Browse** button to search for a picture file. **Note**: This step should be completed only after you have entered all other data in the alert.
Address Information	
Address (Care of)	The street address or name of the person who receives mail for the person.
Street	The second line of the street address, if needed.
City	The city where the person resides.
State	The state where the person resides.
Zip	The zip code for the person address.
Home Phone	The person's home phone number.
Work Phone	The person's work phone number.
Vehicle	
Year	The vehicle year of manufacture.
Make	The vehicle make.
Model	The vehicle model.
Style	The vehicle style.
Color	The color of the vehicle.
License Plate Number	The plate number seen on the vehicle.
Plate State	The state displayed on the license plate.

Continued on next page

Submit Alerts for Person Page Descriptions, Continued

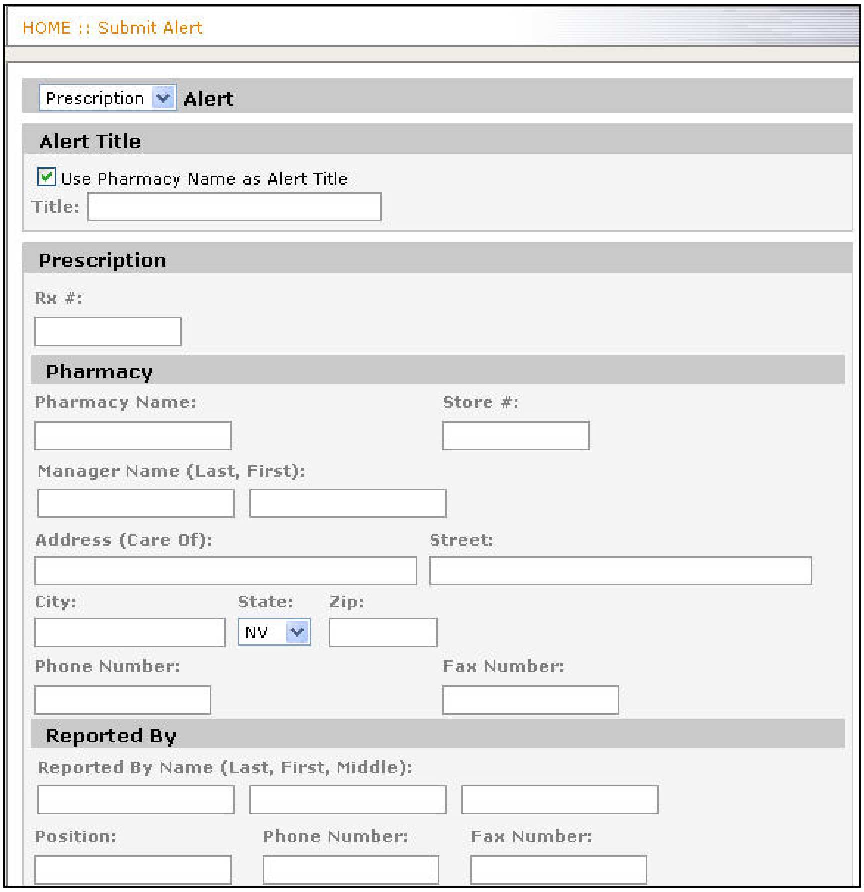
Submit Alerts for Person Page Descriptions (continued)

Field/Button	Description
Suspected Activity	
Alterations	Check if you know or suspect altered prescriptions were used.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	Select if you know or suspect prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	Check if you know or suspect blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	Select if you know or suspect prescriptions had been forged.
Drugs Involved	
Drug	The suspected prescription drug being abused.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug being abused, if known.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to initiator, but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator’s telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

Submitting Prescription Alerts

Procedure

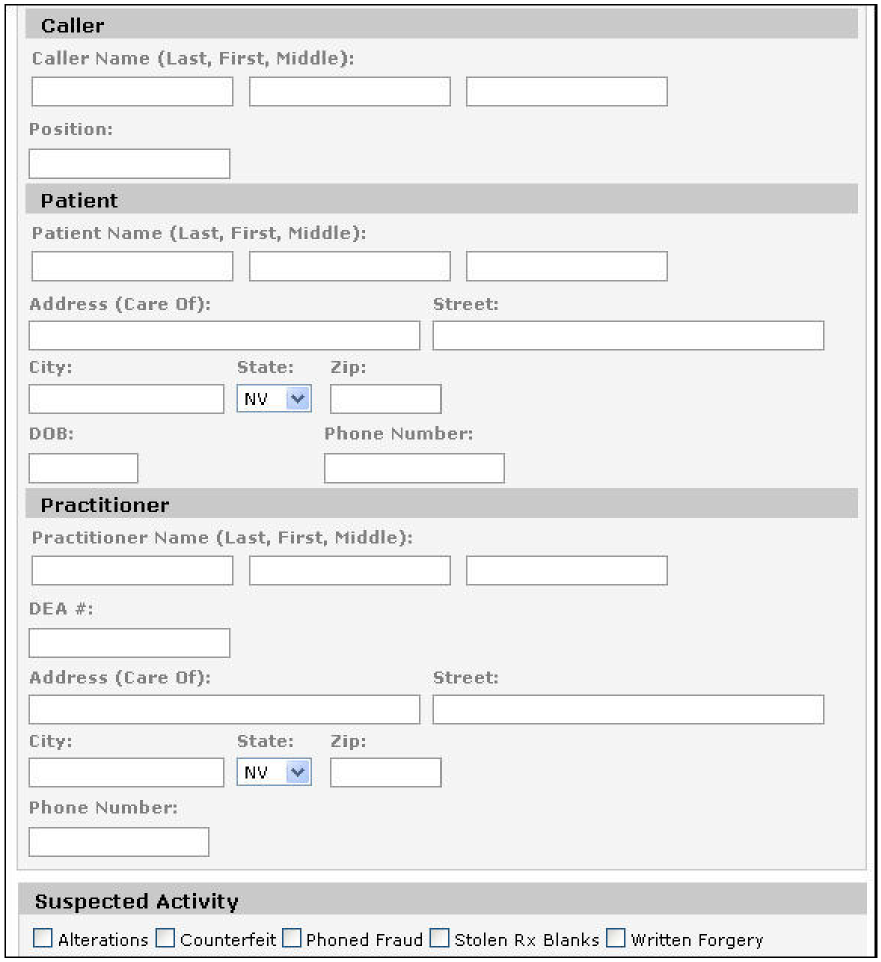
Follow the steps in the table below to submit prescription alerts.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Alerts.</td></tr>
<tr><td>2</td><td>Click Submit.</td></tr>
<tr><td>3</td><td>From the Alert drop-down menu, click Prescription.
Result: The Submit Alert page appears.

</td></tr>
</table>

Continued on next page

Submitting Prescription Alerts, Continued

Procedure (continued)

Step	Action
4	Image continued 

Caller

Caller Name (Last, First, Middle):

Position:

Patient

Patient Name (Last, First, Middle):

Address (Care Of): Street:

City: State: NV Zip:

DOB: Phone Number:

Practitioner

Practitioner Name (Last, First, Middle):

DEA #:

Address (Care Of): Street:

City: State: NV Zip:

Phone Number:

Suspected Activity

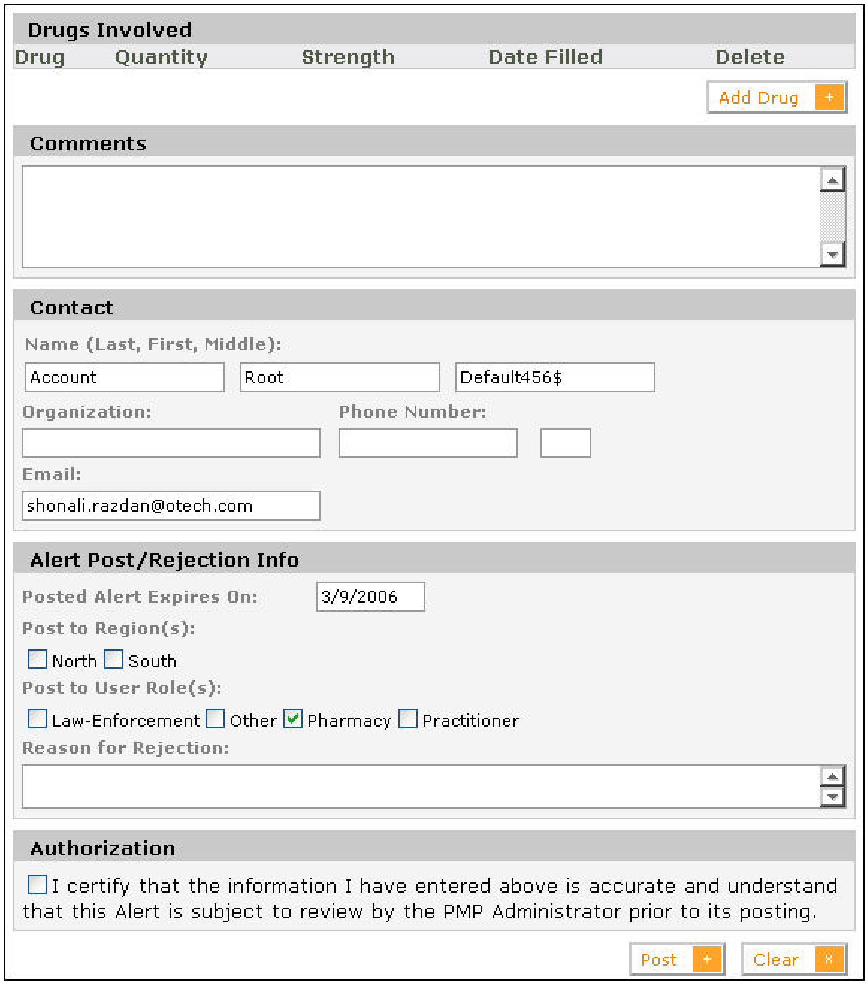
☐ Alterations ☐ Counterfeit ☐ Phoned Fraud ☐ Stolen Rx Blanks ☐ Written Forgery

Continued on next page

Submitting Prescription Alerts, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Image continued



</td></tr>
<tr><td>6</td><td>Click Pharmacy Name as Alert Title.
Note: If you wish to enter a different title, click the box. You can then enter a different Alert Title.</td></tr>
<tr><td>7</td><td>Enter all the information available for the alert.</td></tr>
<tr><td>8</td><td>Click Add Drug to list the drugs on the prescription.
Note: If you need to add another drug, click the button again.</td></tr>
</table>

Continued on next page

Submitting Prescription Alerts, Continued

Procedure (continued)

Step	Action
9	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
10	The Contact data is defaulted to your information, taken from the My Account form. This can be changed if necessary.
11	Click **Submit** to send the Alert to the Administrator for approval and distribution.
12	Click **Clear** to remove all data and start over.

Submitting Alerts for Prescription Page Descriptions

Submitting Alerts for Prescription Page Descriptions

Field/Button	Description
Alert Title	
Use Pharmacy Name as Alert Title	This box is checked by default and triggers using the pharmacy name as the title of the alert to be displayed in the Posted Alerts list. Only clear the box if you want to enter a different title.
Title	Enter a new title for the alert if you cleared the Use Pharmacy Name as Alert Title box. **Note**: The title only appears at the top of the Alert page – it is not used in any of the Alert Data Grids.
Prescription Detail	
Rx #	The prescription number on the prescription.
Pharmacy Detail	
Pharmacy Name	The name of the pharmacy.
Store #	The store number of the pharmacy.
Manager Name	The name of the pharmacy's manager.
Address (Care of)	The care of address of the pharmacy.
Street	The street address of the pharmacy.
City	The city of the pharmacy.
State	The state of the pharmacy.
Zip	The zip code of the pharmacy.
Phone Number	The phone number of the pharmacy.
Fax Number	The fax number of the pharmacy.
Reported By	
Name	The name of the person reporting the prescription.
Position	The position of the person reporting the prescription.
Phone Number	The phone number for the person reporting the prescription.
Fax Number	The fax number for the person reporting the prescription.

Continued on next page

Submitting Alerts for Prescription Page Descriptions, Continued

Submitting Alerts for Prescription Page Descriptions (continued)

Field/Button	Description
Caller Detail	
Name	The name of the caller for the prescription.
Position	The position of the caller for the prescription.
Patient Detail	
Name	The name of the patient on the prescription.
Address (Care of)	The care of address of the patient.
Street	The street address of the patient.
City	The city of the patient.
State	The state of the patient.
Zip	The zip code of the patient.
Phone Number	The phone number of the patient.
DOB	The date of birth of the patient.
Practitioner Detail	
Name	The name of the practitioner on the prescription.
DEA #	The DEA number of the practitioner.
Address (Care of)	The care of address of the practitioner.
Street	The street address of the practitioner.
City	The city of the practitioner.
State	The state of the practitioner.
Zip	The zip code of the practitioner.
Phone Number	The phone number of the practitioner.

Continued on next page

Submitting Alerts for Prescription Page Descriptions, Continued

Submitting Alerts for Prescription Page Descriptions (continued)

Field/Button	Description
Suspected Activity	
Alterations	Check if you know or suspect altered prescriptions were used.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	Select if you know or suspect prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	Check if you know or suspect blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	Select if you know or suspect prescriptions had been forged.
Drugs Involved	
Drug	The drug that was prescribed.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Date Filled	The date the drug was dispensed by the pharmacy.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to Initiator but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator's telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

Searching Alerts

Introduction

The Search Alerts option provides the ability to search the database for any subset of the alerts you are authorized to access. You can search either through person alerts or through prescription alerts by specifying so in the drop-down menu.

Procedure

Follow the steps in the table below to search alerts.

Step	Action
1	From the main menu, click **+Alerts**.
2	Click **Search**. **Result**: The Search Alerts page appears.
3	From the **Alert** drop-down menu select the type of alerts you want to search through.
4	Enter as much information as you can to identify the alert being searched. **Note**: The criteria are linked by a virtual "and", so every item selected must be satisfied to return an alert in the search results.
5	From the **Search Reason** drop-down menu at the end of the form, select the appropriate reason. **Note**: This field is required.
6	Click **Search** to begin the search. Search results are displayed in a new form.
7	To view the alert details, highlight and click a row in the Search Results grid. **Result**: The original Alert detail is shown, even if expired.
8	Click **Search Alerts** again and the previous Search screen appears, with your original search criteria.
9	Click **Clear** to remove all data and start over.

Chapter 23: Messages Function

Overview

Introduction

The Messages function allows users to view notification messages.

The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful.

When you experience access issues, general problems, or have questions regarding the portal, you can create issue messages and post them to Messages for an administrator to view and reply.

The Messages function does not allow you to send issue messages to other users.

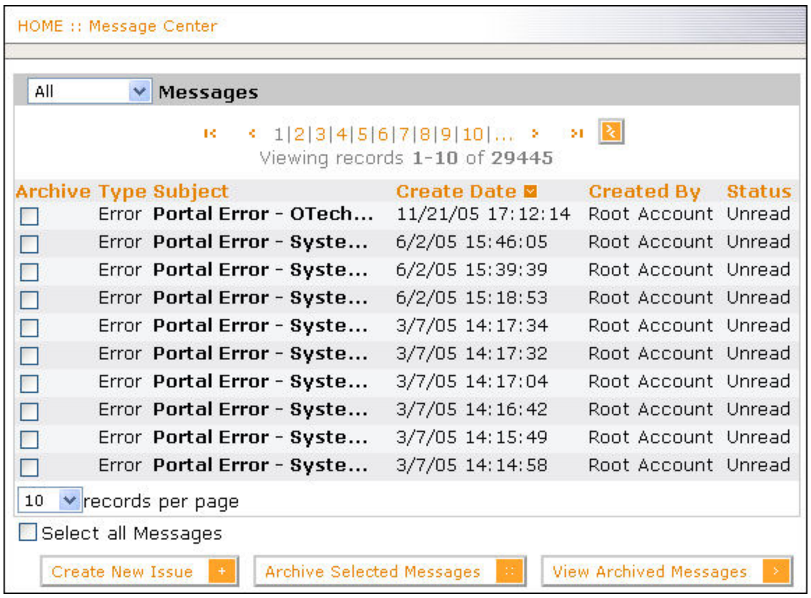
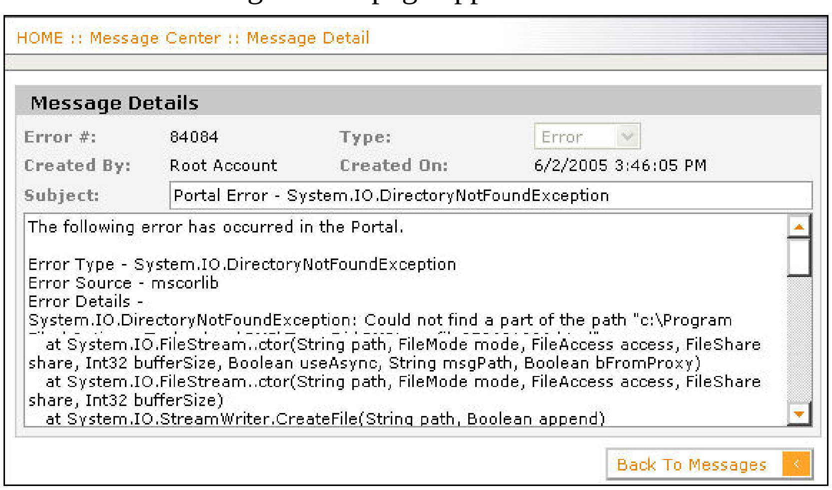
Contents

This chapter contains the following topics:

Viewing Messages

Procedure

Follow the steps in the table below to view messages.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
<tr><td>2</td><td>Highlight and click the row containing the message you want to view.
Result: The Message Detail page appears.

</td></tr>
</table>

Message Center Page Descriptions

Message Center Page Descriptions

Field/Button	Description
Archive	Check this box to select messages to be archived. See Archiving Messages on page 210 of this document.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. Only an administrator receives error messages. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When you experience access issues, general problems, or have questions regarding the portal, you can create issue messages and post them to Messages for an administrator's view and response. When an issue is resolved, either you or the administrator has authorization to close the issue. The 'Messages' function does not allow you to send issue messages to other users.
Subject	Provides a title or brief description of the notification or issue.
Created Date	The day and time when the system generated an issue message.
Created By	The user account that generated the message.
Status	The status of a message. There are three status types: read, unread, and updated. • **Read**: Indicates that you have read a message. • **Unread**: Indicates that you have not read a message. • **Updated**: Indicates that an administrator has read and updated an issue message that you posted.

Continued on next page

Message Center Page Descriptions, Continued

Message Center Page Descriptions (continued)

Field/Button	Description
Create New Issue button	Allows you to create an issue for an administrator to solve. There are three issue types: access, problem, and question. • **Access**: Indicates that you are experiencing security profile or login issues. • **Problem**: Indicates that you are experiencing general problems within the portal. • **Question**: Indicates that you have a general question.
Archive Selected Messages button	Archives the selected messages. **Note**: Archived messages are read-only and cannot be restored. Verify your message selection before clicking the **Archive Selected Messages** button.
View Archived Messages button	Allows you to view archived messages. **Note**: Archived messages are read-only and cannot be restored.

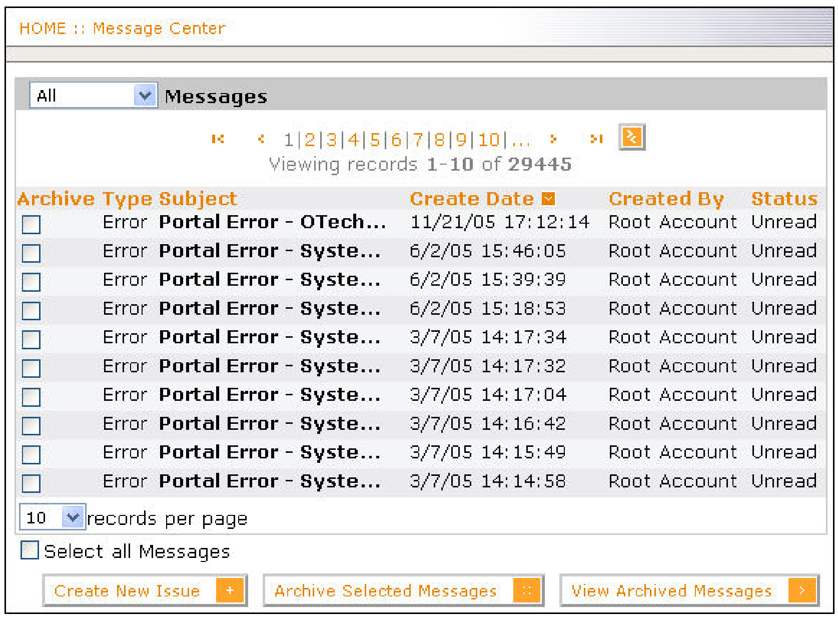
Creating an Issue

Introduction

If you experience access issues, general problems, or have questions regarding the portal, then you can create issue messages and post them for an administrator to view and respond.

Procedure

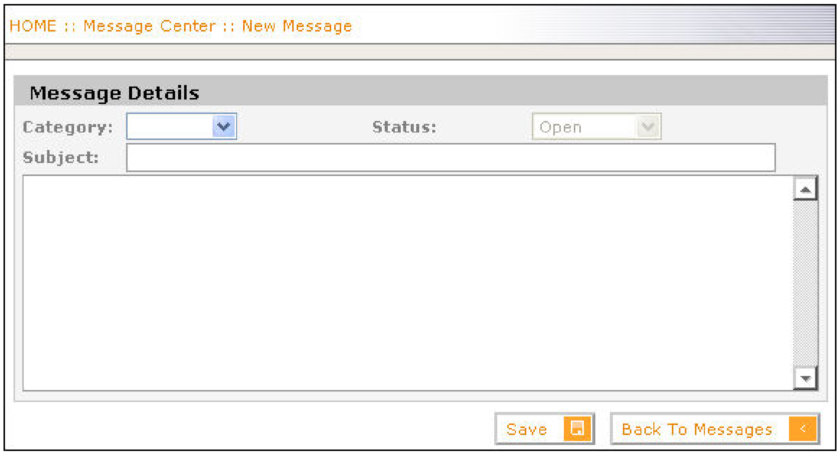
Follow the steps in the table below to create an issue.

Step	Action
1	From the main menu, click **Messages**. **Result**: The Message Center page appears. 

Continued on next page

Creating an Issue, Continued

Procedure (continued)

Step	Action
2	Click **Create New Issue**. **Result**: The New Message page appears. 
3	From the **Category** drop-down menu, select a category that best describes your issue.
4	Type a subject into the **Subject** field.
5	Type an issue message into the text box.
6	Click **Save** to submit your issue message.
7	Click **Back to Messages** to cancel changes and go back to the Message Center page.

New Message Page Descriptions

New Message Page Descriptions

Field/Button	Description
Category	Allows you to select a category that best describes your issue. There are three issue types: access, problem, and question. • **Access**: Indicates that you are experiencing security profile or login issues. • **Problem**: Indicates that you are experiencing general problems within the portal. • **Question**: Indicates that you have a general question.
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the administrator. • **Open**: Indicates that you opened an issue message and it requires an administrator's response. • **Responded**: Indicates that you responded to an administrator's comments and that the issue message requires follow-up remarks or closure. **Note**: When you create an issue message, Status defaults to "Open" and cannot be changed.
Subject	Provide a title or brief description of the issue.
Save button	Sends your issue message to the administrator.
Back to Messages button	Cancels all changes and sends you back to the Messages list.

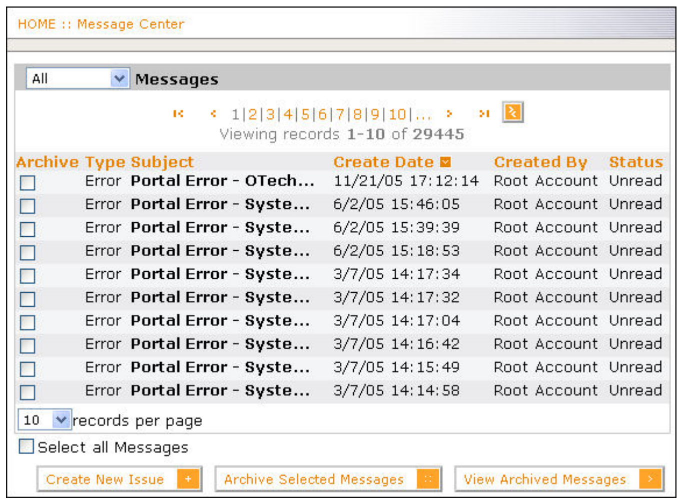
Responding to an Issue

Introduction

If the system administrator has assigned you a security profile that has access to responding to issues, you will be able to see issues raised by other users and respond to the same.

Procedure

Follow the steps in the table below to respond to an issue.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
<tr><td>2</td><td>Click the issue that you want to answer.
Result: The Message Detail page appears.</td></tr>
<tr><td>3</td><td>From the Responses text box, type your response to the user’s message.
Note: The Responses text box is the only text box used in this correspondence. To track each response, organize the Responses text box by typing your name or job title before your reply. For example, type “Admin:” before each response that you provide.</td></tr>
<tr><td>4</td><td>If your response solves the user’s issue and you want to close the issue, click Closed from the Status drop-down menu.</td></tr>
<tr><td>5</td><td>Click Save to submit your response.</td></tr>
<tr><td>6</td><td>Click Back to Messages to cancel changes.</td></tr>
</table>

Message Detail Page Description

Message Detail Page Description

Field/Button	Description
Message Details	
Issue #	Unique identifier, which distinguishes an issue message from all others within the system.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When users experience access issues, general problems, or have questions regarding the portal, they can create issue messages and post them to the Message Center for you to view and reply. When an issue is resolved, either you or the user has authorization to close the issue. The Message Center does not allow users to send issue messages to other users.
Created By	Indicates the user that generated the issue message.
Created On	Indicates the date and time the user created the issue message.
Category	Allows a user to select a category that best describes the issue. There are three issue types: access, problem, and question. • **Access**: Indicates that the user is experiencing security profile or login issues. • **Problem**: Indicates that the user is experiencing general problems within the portal. • **Question**: Indicates that the user has a general question.

Continued on next page

Message Detail Page Description, Continued

Message Detail Page Description (continued)

Field/Button	Description
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the user. • **Open**: Indicates that a user opened an issue message and it requires your response. • **Responded**: Indicates that a user responded to the issue message and it requires follow-up remarks or closure.
Subject	Provides a title or brief description of the issue.
Responses	
Response Text Box	Provides a text box, which allows you and the user to correspond. **Note**: The **Responses** text box is the only text box used during a correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your response. For example, type "Admin:" before each response that you provide.
Save button	Sends your response to the user.

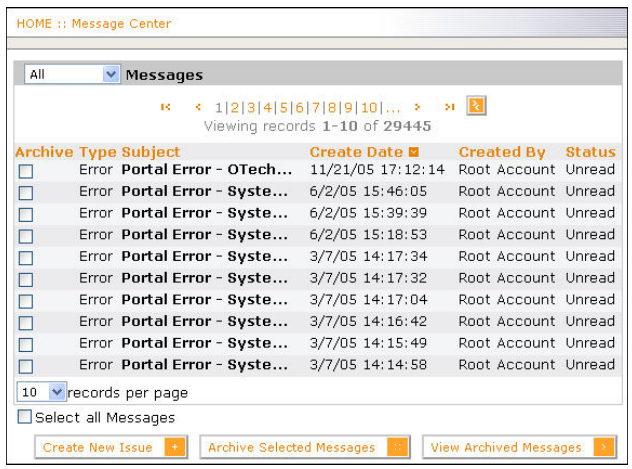
Responding to an Answer

Introduction

If you posted a message and the administrator's response did not solve the issue, then you can respond to their answer with follow-up questions or comments.

Procedure

Follow the steps in the table below to respond to an answer.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
<tr><td>2</td><td>Click the message that you want to respond to.
Result: The Message Detail page appears.</td></tr>
<tr><td>3</td><td>In the Responses text box, type your response below the administrator's message.
Note: The Responses text box is the only text box used during a correspondence. To track each response, organize the Responses text box by typing your name or job title before your response. For example, type "User:" before each response that you provide. See example on the following page.</td></tr>
<tr><td>4</td><td>If the administrator's response solves your issue, click Closed from the Status drop-down menu to close the issue.</td></tr>
<tr><td>5</td><td>Click Save to submit your response.</td></tr>
<tr><td>6</td><td>Click Back to Messages to cancel changes.</td></tr>
</table>

Message Detail Page Description

Message Detail Page Description

Field/Button	Description
Message Details	
Issue #	Unique identifier, which distinguishes an issue message from all others within the system.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When users experience access issues, general problems, or have questions regarding the portal, they can create issue messages and post them to the Message Center for you to view and reply. When an issue is resolved, either you or the user has authorization to close the issue. The Message Center does not allow users to send issue messages to other users.
Created By	Indicates the user that generated the issue message.
Created On	Indicates the date and time the user created the issue message.
Category	Allows a user to select a category that best describes the issue. There are three issue types: access, problem, and question. • **Access**: Indicates that the user is experiencing security profile or login issues. • **Problem**: Indicates that the user is experiencing general problems within the portal. • **Question**: Indicates that the user has a general question.

Continued on next page

Message Detail Page Description, Continued

Message Detail Page Description (continued)

Field/Button	Description
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the user. • **Open**: Indicates that a user opened an issue message and it requires your response. • **Responded**: Indicates that a user responded to the issue message and it requires follow-up remarks or closure.
Subject	Provides a title or brief description of the issue.
Responses	
Response Text Box	Provides a text box, which allows you and the user to correspond. **Note**: The **Responses** text box is the only text box used during a correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your response. For example, type “Admin:” before each response that you provide.
Save button	Sends your response to the user.
Back to Messages	Cancel changes and return to the Messages screen.

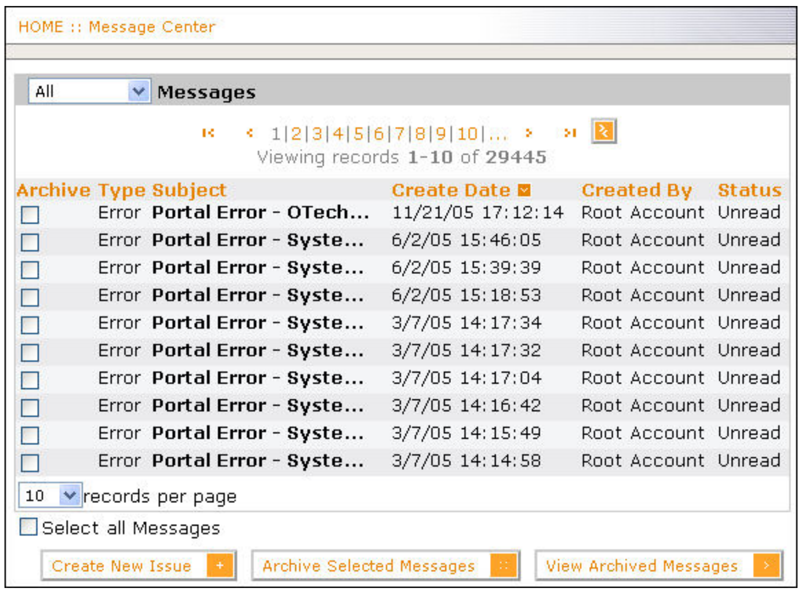
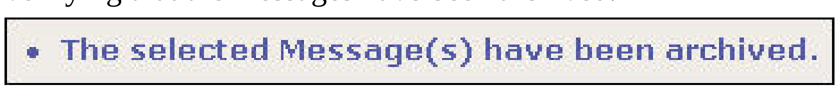
Archiving Messages

Introduction

The Messages function allows you to archive selected messages.

Procedure

Follow the steps in the table below to archive messages.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
<tr><td>2</td><td>Click the check boxes next to the messages that you want to archive.
Note: Archived messages are read-only and cannot be restored or edited.</td></tr>
<tr><td>3</td><td>Verify your message selection.</td></tr>
<tr><td>4</td><td>Click Archive Selected Messages. A message is appears verifying that the messages have been archived.

</td></tr>
</table>

Viewing Archived Messages

Introduction

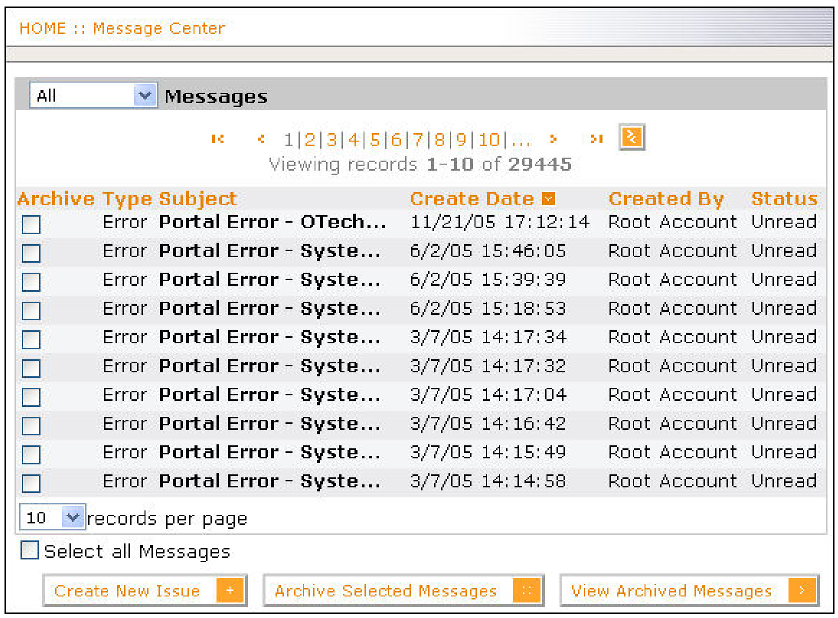
The Messages function allows you to view archived messages.

Note: Archived messages are read-only and cannot be restored or edited.

Procedure

Follow the steps in the table below to view archived messages.

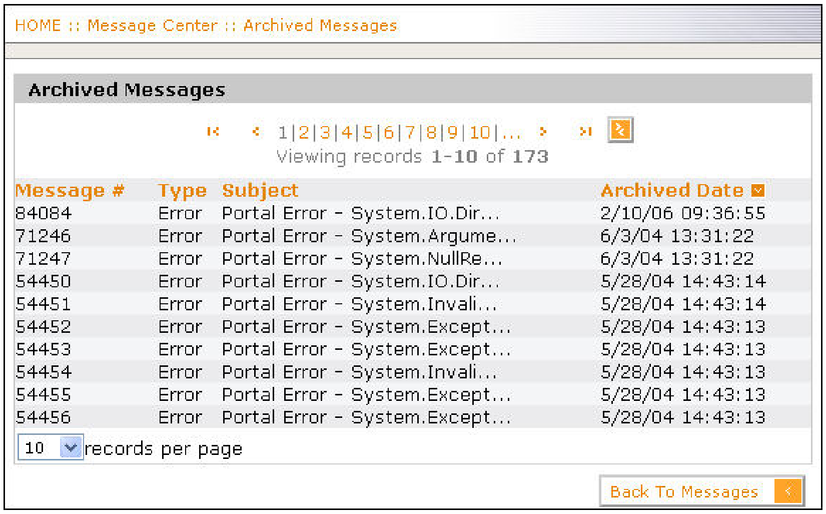
Step	Action
1	From the main menu, click **Messages**. **Result**: The Message Center page appears.



Continued on next page

Viewing Archived Messages, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click View Archived Messages.
Result: The Archived Messages page appears.

</td></tr>
<tr><td>3</td><td>From the Subject column, click the name of the archived message that you want to view.
Result: The Message Details page appears.</td></tr>
<tr><td>4</td><td>When you have finished reading the message, click Back to Archived Messages to be returned to the Archived Messages list.</td></tr>
<tr><td>5</td><td>Click Back to Messages to be returned to the Message Center page.</td></tr>
</table>

Archived Messages Page Descriptions

Archived Messages Page Description

Field/Button	Description
Message #	Unique identifier, which distinguishes a message from all others within in the system.
Type	Displays the type of message that you archived.
Subject	Provides a title or brief description of the error, notification, or issue.
Archived Date	The date when you archived a message.
Back to Archived Messages button	Returns you to the Archived Messages page.
Back to Messages button	Returns you to the Messages page.

Chapter 24: My Account

Overview

Introduction

The My Account section allows you to change your user account information, such as contact information and password.

Contents

This chapter contains the following topics:

Viewing or Changing Account Information

Introduction

The My Account section allows you to view or change your account information, such as your password, your title, your address and telephone numbers, as well as your preference for receiving messages from the Web Center.

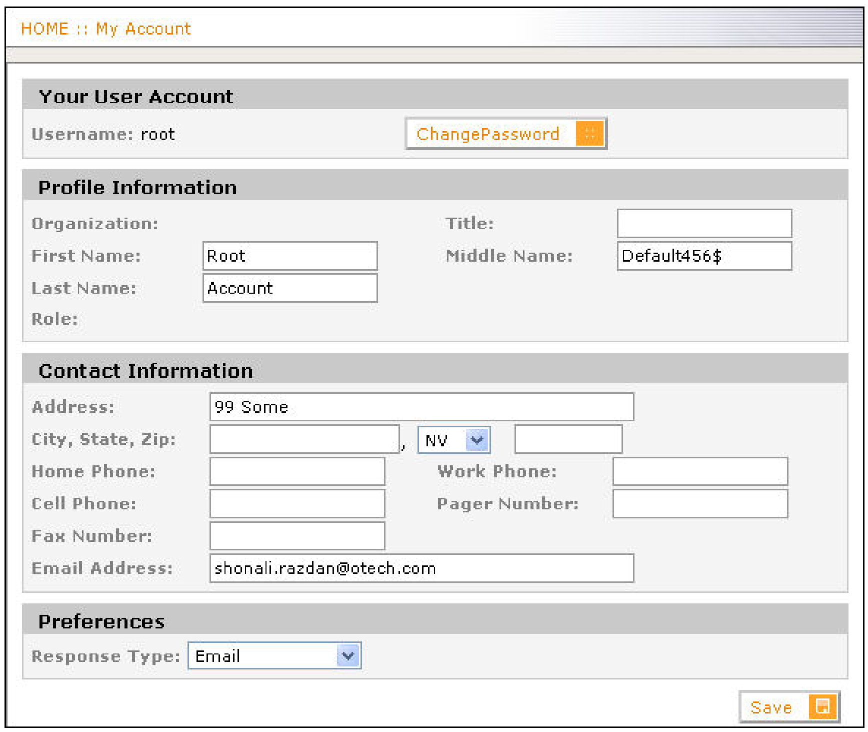
Procedure

Follow the steps in the table below to view or change account information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

From the main menu, click **My Account**.

Result: The My Account page appears.



</td></tr>
<tr><td>2</td><td>To change your password, click Change Password and follow the Changing the Password procedure on page 220.</td></tr>
<tr><td>3</td><td>To change your account information, edit the information in the appropriate fields.</td></tr>
<tr><td>4</td><td>Click Save to save the changes.</td></tr>
</table>

Continued on next page

Viewing or Changing Account Information, Continued

Email Notification of Account Changes

The PMP system automatically notifies you by email if any information has been changed on your My Account page.

- If your email address has been changed an email notification is sent to both the old and the new email address informing you of the change.
- If any other information has been changed an email notification is sent to your email address notifying you that a change has been made.

If you feel that the information that was changed is incorrect, you need to contact your administrator immediately.

My Account Page Descriptions

My Account Page Descriptions

Field/Button	Description
Your User Account	
Username	The user name on the account. **Note**: This information is read-only and cannot be changed.
Change Password button	Changes the password on the account.
Profile Information	
Organization	The name of your organization. This information is read-only and cannot be changed except by the Administrator.
Title	Your job title.
Badge #	Your badge number. This information is read-only and cannot be changed except by the Administrator.
Unit #	The unit where you are assigned. This information is read-only and cannot be changed except by the Administrator.
First Name	Your first name.
Middle Name	Your middle name.
Last Name	Your last name.
Contact Information	
Address	The street address where you reside.
City, State, Zip	The city, state, and zip code where you reside.
Home Phone	Your home phone number.
Work Phone	Your work phone number.
Cell Phone	Your cell phone number.
Pager Number	Your pager number.
Fax Number	Your fax number.
Email Address	Your e-mail address.

Continued on next page

My Account Page Descriptions, Continued

My Account Page Descriptions (continued)

Field/Button	Description
Preferences	
Response Type	This sets the way you receive request data, alerts and messages. If you select: • **Email** messages to the e-mail address provided above. • **Fax** routes messages to the fax number listed above. • **Message Center** sends the notifications to the Messages function for later pick-up.
Save button	Saves the changes you made to the contact information.

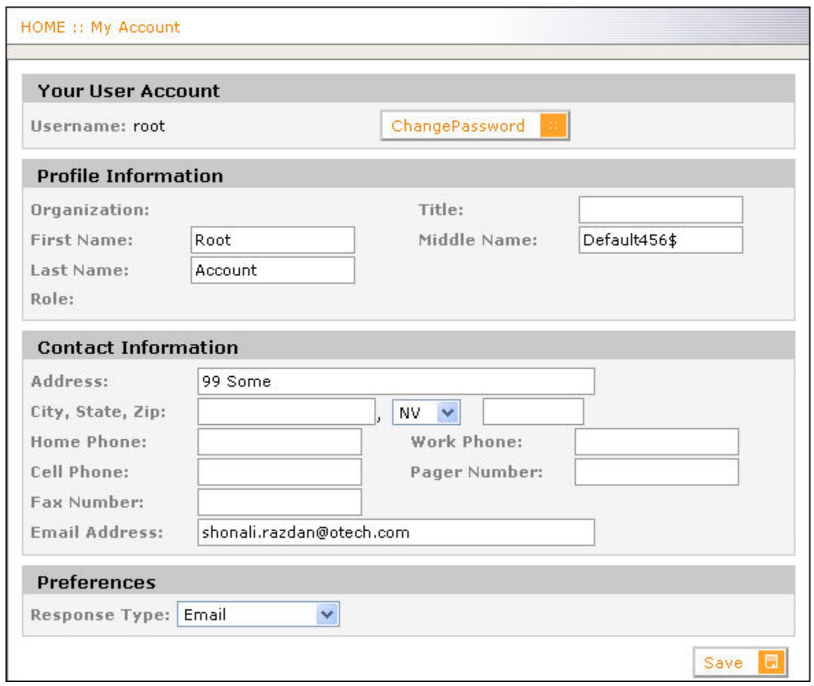
Changing the Password

Introduction

The My Account section allows you to change your password. Most agencies require employees to change their passwords periodically. If you are required to change your password periodically, the system notifies you five days before the password expires.

Procedure

Follow the steps in the table below to change the password.

Step	Action
1	From the main menu, click **My Account**. **Result**: The My Account page appears. 
2	Click **Change Password** to change your password. **Result**: The Change Password page appears.
3	In the **Current Password** field, type your current password.

Continued on next page

Changing the Password, Continued

Procedure (continued)

Step	Action
4	In the **New Password** field, type your new password. Password requirements, must contain at least: • 8 characters in length • One uppercase alphabet letter • One lowercase character • One number character • One symbol character **Example**: Root$123
5	In the **Confirm Password** field, type your new password again.
6	Click **Change** to save your new password.
7	Click **Cancel** to delete all changes. Your password remains the same as it originally was.

Change Password Page Descriptions

Change Password Page Descriptions

Field/Button	Description
Current Password	The password that must be changed.
New Password	The new password that you want to use. Password requirements, must contain at least: • 8 characters in length • One uppercase alphabet letter • One lowercase character • One number character • One symbol character **Example**: Root$123
Confirm Password	Retype the password for your account. The information that you type in this field must match the information typed in the **New Password** field.
Change button	Saves the password changes.
Cancel button	Cancels any changes and returns you to the My Account page.

Chapter 25: Accessing the User Directory

Overview

Introduction

The User Directory section allows you to view another user's profile and contact information.

Contents

This chapter contains the following topics:

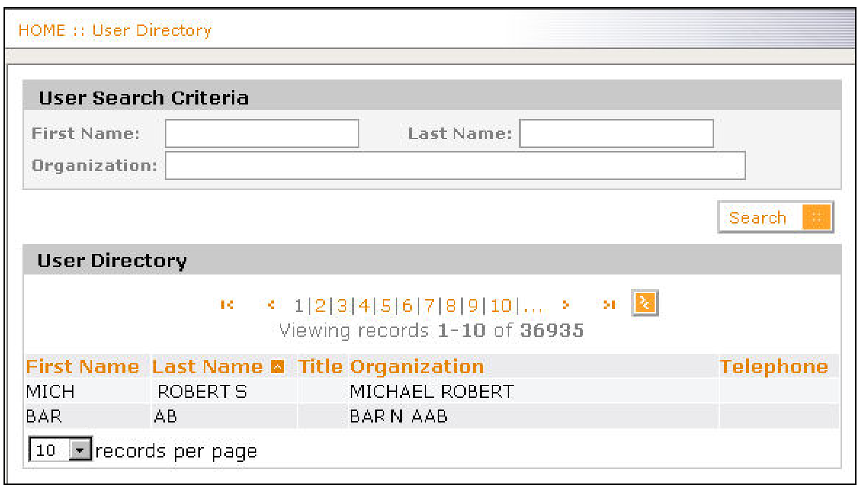
Viewing User Account Information

Introduction

The User Directory section allows you to view the contact information of other users.

Procedure

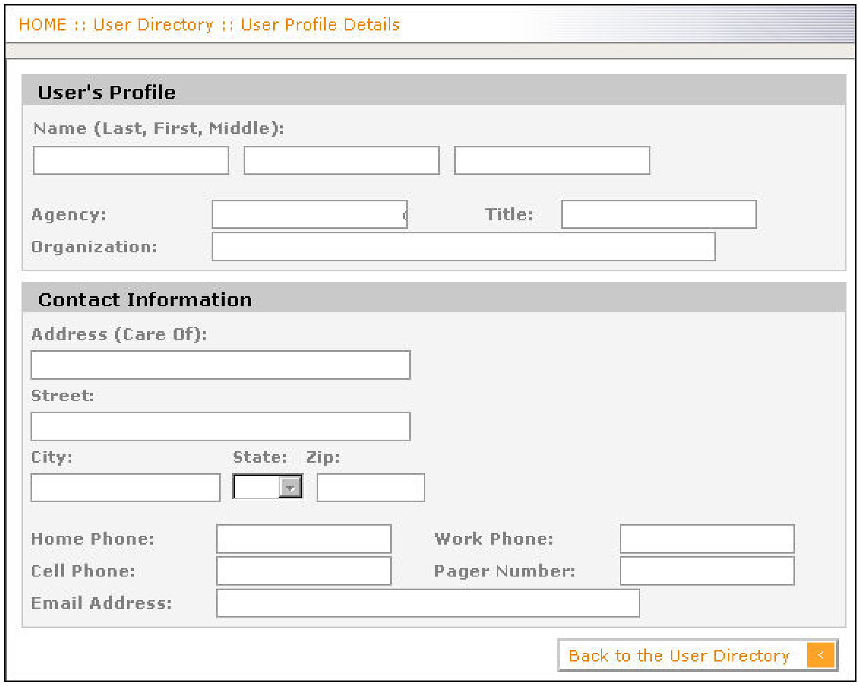
Follow the steps in the table below view user account information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click User Directory.
Result: The User Directory page appears.

</td></tr>
</table>

Continued on next page

Viewing User Account Information, Continued

Procedure (continued)

Step	Action
2	Click a user to view their profile and contact information. **Result**: The User Profile Details page appears.  **Note**: A user's profile and contact information is read-only and cannot be edited by another user.
3	Click **Back to the User Directory** to return to the User Directory page.

User Directory Page Descriptions

User Directory Page Descriptions

Field/Button	Description
First Name	The first name of each user in the directory.
Last Name	The last name of each user in the directory.
Title	The job title of each user in the directory.
Agency	The agencies to which each user belongs.
Telephone	The telephone numbers of the users in the directory.

User Directory Details Page Descriptions

User Directory Details Page Descriptions

Field/Button	Description
Name	The user's name in Last, First Middle format.
Agency	The agency to which the user belongs.
Title	The job title of the user.
Address (Care of)	The first line of the street address or the "care of" name for the user where they receive mail.
Street	The second line of the street address, unless a "care of" name was used.
City	The city for the user address.
State	The state for the user address.
Zip	The zip code for the user.
Home Phone	The user's home telephone number.
Work Phone	The user's work telephone number.
Cell Phone	The user's cell telephone number.
Pager Number	The user's pager telephone number.
Email Address	The user's e-mail address.
Back to the User Directory button	Click this button to be returned to the User Directory.

Content Management

Chapter 26: FAQs

Overview

Introduction

The FAQ section allows users to view the FAQs.

Contents

This chapter contains the following topics:

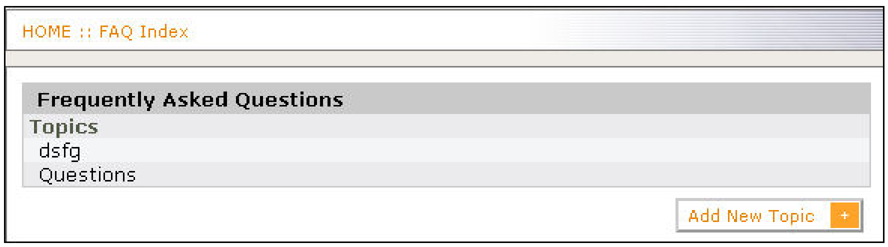
Viewing the FAQ Index

Introduction

The FAQ section allows users to view the FAQs.

Procedure

Follow the step in the table below to view a list of FAQs.

Step	Action
1	From the main menu, click **FAQ**. **Result**: The FAQ Index page appears. 

FAQ Index Page Descriptions

FAQ Index Page Descriptions

Field/Button	Description
Topics	View the FAQs that were entered into the system.
Add New Topic button	Create a new FAQ topic.

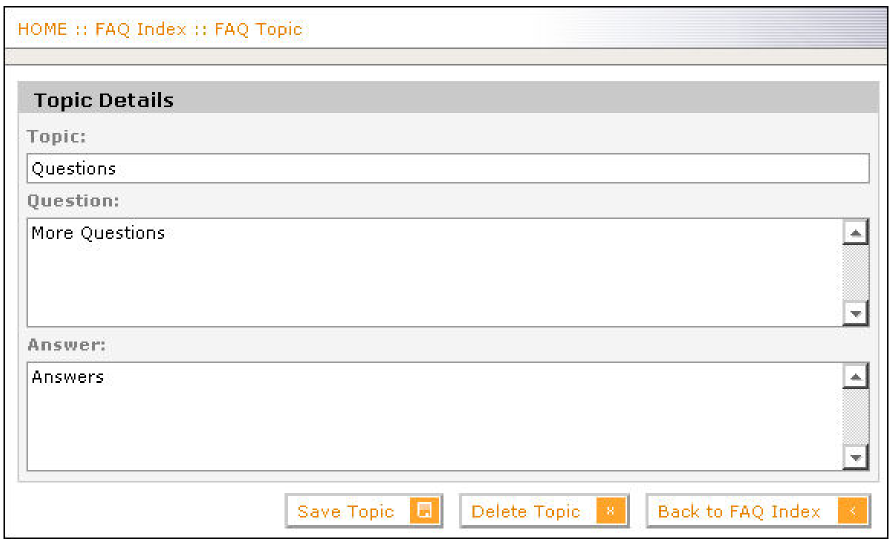
Viewing an FAQ Topic

Introduction

The FAQ section allows users to view an FAQ topic.

Procedure

Follow the steps in the table below to view and FAQ topic.

Step	Action
1	From the main menu, click **FAQ**.
2	From the FAQ Index page, click the name of the FAQ topic that you want to view. **Result**: The FAQ Topic page appears. 

FAQ Topic Page Descriptions

FAQ Topic Page Descriptions

Field/Button	Description
Topic	The subject of the question.
Question	The question.
Answer	The answer to the question.
Save Topic button	Save the modified FAQ topic.
Delete Topic button	Delete the FAQ topic.
Back to FAQ Index button	Returns you to the FAQ Index page.

Chapter 27: InfoCenter

Overview

Introduction

The InfoCenter section allows users to view the news and information that was posted to the Portal.

Contents

This chapter contains the following topics:

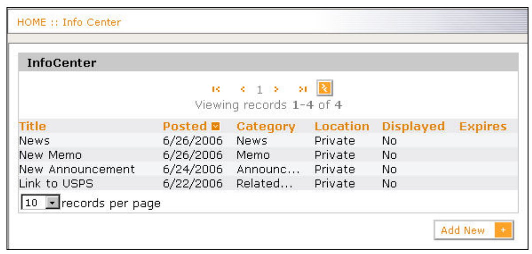
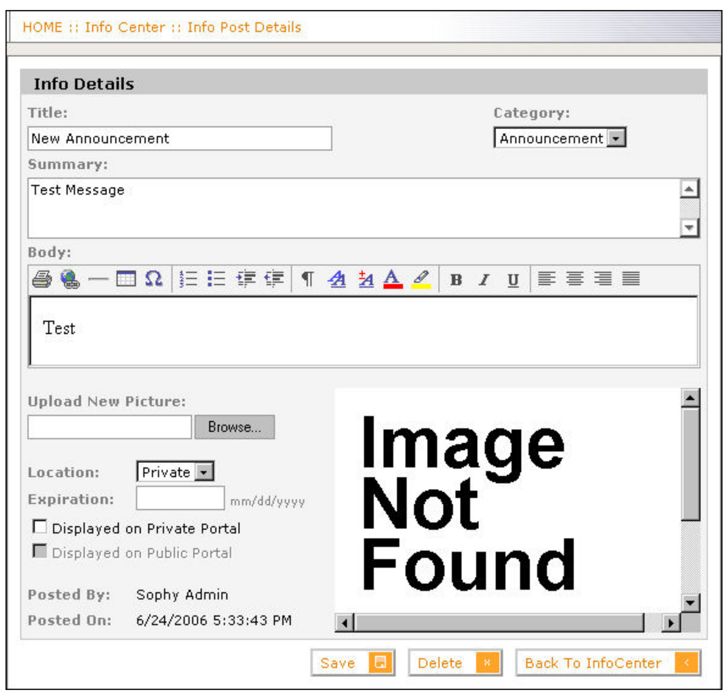
Viewing the InfoCenter

Introduction

The InfoCenter section allows users to view the news and information that was posted to the Portal.

Procedure

Follow the steps in the table below to view the InfoCenter.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click InfoCenter.
Result: The InfoCenter page appears.

</td></tr>
<tr><td>2</td><td>Click the item that you wish to view.
Result: The InfoCenter Details page appears.

</td></tr>
</table>

InfoCenter Page Descriptions

InfoCenter Page Descriptions

Field/Button	Description
Title	An identifying name given to a news post.
Posted	The date the information was posted to the Portal.
Category	Describes the type of information that is posted, such as News, Memo, Announcements, etc.
Location	Identifies where the information appears, which for the Web Center is always the Portal (Private).
Displayed	Indicates whether the news post is displayed on the Portal Home page.
Expires	The day the news post expires and is no longer displayed on the home page of the Portal.

Chapter 28: Using Related Links

Overview

Introduction

The Related Links functionality allows you to quickly access important external links.

Contents

This chapter contains the following topic:

Using a Related Link

Procedure

Follow the steps in the table below to use a Related link.

Step	Action
1	From the main menu, click **Related Links**. **Result**: The Related Links page appears. 
2	Click on the link that you wish to view.

Index