Functional Specification Document for ElitePharmaPro

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Dashboard

:

- To show all statistical information in graphical format.

Available graphs are :

- Purchase Amount Per Schedule.
- Monthly Controlled Substances Purchase Amount.
- Monthly Controlled Substances Reimbursement Amount.
- Purchase Drugs per Type
- Monthly Purchase Amount per Type
- Purchase Drugs per Wholesaler
- Purchase Amount per Wholesaler
- Purchase Amount per Contract
- Inventory Turns

Steps to follow :

1. Select Pharmacy
2. Select Date period
3. Click filter button

Above steps will fetch results and will present it in graphical format.

Drag and drop is also possible so that users can place graphs as per their convenience.

To make changes to any graph, users need to click on the edit button and then can make changes in size of the graphs and position of that graph and then need to click on the save button.

After making changes the user will have that change as permanent and can change it whenever needed.

Same goes with other graphs which are present on other reports of the reports center screen.

Reports

Reports Center:

- This screen consists of different types of reports which gives graphical representation of it as well as displays the same data in tabular format.

Available Modules are :

- Overstocked Report
- Purchase Report
- Inventory Summary Report By NDC
- Inventory Summary Report By CFI
- Inventory Summary Report By 9 digit NDC
- Drug Price History

Steps to follow :

1. Select Pharmacy
2. Select Date period
3. Click filter button

Above steps will fetch results in Summary as well as Detail tab.
Summary tab will show graphical representation of data and Detail tab will display tabular information
By clicking on any graphs can also navigate to the tabular representation of the data.

- ### Overstocked Report

  This report helps to find out the drugs which have not been dispensed in a particular duration.

- ### Purchase Report

  This report shows information related purchases.

- ### Inventory Summary By NDC

  This report shows the purchase and dispense summary by NDC

- ### Inventory Summary By CFI

  This report shows the purchase and dispense summary by CFI

- ### Inventory Summary By 9 digit NDC

This report shows the purchase and dispense summary by 9 digit NDC, this NDC is available without pack size information and that's why it is of 9 digit.

- Drug Price History

This report shows price history in a specific date period and for only those drugs which are purchased in the same date period.

Steps to follow :

1. Select Pharmacy
2. Select Wholesaler
3. Select Price History Date Period
4. Select Purchase Date Period
5. Select Type of Drug
6. Click filter button

Above steps will fetch results in Summary as well as Detail tab.

Summary tab will show graphical representation of data and Detail tab will display tabular information

By clicking on any graphs can also navigate to the tabular representation of that data.

In the Overstocked report if clicked on "Qty on Hand " (Bill/Fill based on pharmacy inventory specs) value it will open the inventory detail screen.

To get information in Excel form click the "Export " button.

To change the graph size or position click on edit button then change the position or size and click on save button this will save the graph changes.

- Drug Expiration Report

This report shows expired NDC's which fall between the adjustment date as well as expiration date.

Steps to follow :

1. Select Pharmacy
2. Select Adjustment Date Period
3. Select Expiration Date Period
4. Click Filter button

Users can select the schedule, enter the ndc and drug as per their need.

- Inventory Discrepancy Report

This report shows alternate ndc's available for a given ndc which is already managed in inventory to help manage discrepancies in inventory.

Steps to follow :

1. Select Pharmacy
2. Select Date
3. Click Filter button

- Purchase Detail Report

This report gives a detailed summary of debit invoices.

Steps to follow :

4. Select Pharmacy
5. Select Date
6. Click Filter button

Inventory

Inventory Tracking:

- To keep track of drug inventory.
- Here we can get all the information about a drug like when it is dispensed,available quantity of this drug in inventory it also shows information about the drug which is returned after dispensed.

Steps to follow :

1. Select Pharmacy
2. Input Filters:
   a. NDC
   b. Drug
   c. Manufacturer
3. Click filter button

Above steps will fetch results in tabular format,and users can get status of the inventory stock easily.

Available Submodules:

- Drug Adjustment

This screen is used to perform operations over a drug like drug initialization, drug increment, drug decrement and drug transfer between different pharmacy locations.

Steps to follow:

1. Select Pharmacy Location
2. Select Adjustment Date
3. Select Type of Transaction
4. Select Drug
5. Input Quantity
6. Input Note
7. (in case of drug transfer > select Transfer to/from)
8. Click Add Button

Above steps will add that drug in the drug adjustment list and will be stored in the Drug adjustment table.

If you try to initialize a NDC more than 1 time then after saving it will give an alert that duplicate initialization is not allowed and that records will not be entered in the drug adjustment table.

After entering NDC and quantity next column “Qty on Hand”(Bill/Fill based on pharmacy inventory specs) will display some value only if inventory is maintained for that NDC otherwise no value will be displayed for that NDC

If pharmacy location is selected as “dolphin health pharmacy” then “Transfer to” column will show other pharmacy locations as values but not “dolphin health pharmacy”
We have an “Add” button as well as a link so that users will be able to add a new row through the Tab key also.

At the time of drug increment/decrement/transfer/expired/damaged/current qty on hand it will show only those Drugs (under drug column) which are available in that pharmacy location.

Expired option will allow users to mark NDC’s as expired with expiration date(both future and past dates are allowed) and note the same goes for Damage option to mark/save damaged NDC’s in inventory.

Current on-hand Quantity option will allow users to specify the current count of NDC’s in inventory and inventory will be managed from that specified count.If user enters same qty as of on hand quantity it will give a message that current on hand qty and Quantity can’t be the same.

- Inventory Detail

This screen is used to display drugs which are dispensed, purchased, initialized or returned.

To Access this screen click on the value of “Qty on Hand”(Bill/Fill based on pharmacy inventory specs) column.

Inventory Reconciliation :

- To compare virtual inventory counts with records of inventory on hand.
- This screen will help in reducing stock discrepancies
- User can also add new NDC’s which are not present in virtual inventory and can start managing those NDC’s in inventory
- NDC’s can be reconciled as per the schedule or combination of it.
- Reconciliation scheduler can be created and once created can automatically create the ReconciliationJob for the next cycle of reconciliation.

Steps to follow :

1. Select Pharmacy
2. Select filter button
3. Click Add button now Select
    a. DrugCategory
    b. Reconciliation Based On
    c. ReconciliationFrequency

4. Click Save button

Above steps will create a ReconciliationJobScheduler

As soon as the ReconciliationJobScheduler is added the ReconciliationJob will be added with name followed by keyword ‘initialization’ and status Start,using this ReconciliationJob user can start the reconciliation process.

For ReconciliationJobSchedulers

There are different types of drug categories like:
Regular drugs
OTC drugs
Schedule 2 drugs
Schedule 3 drugs
Schedule 4 drugs and
Schedule 5 drugs

Reconciliation based on
bill and fill

Reconciliation frequencies are:
Monthly, weekly, quarterly, bi-yearly and yearly

Duplicate active drug categories are not allowed for a specific reconciliation based on.

For ReconciliationJob

Every ReconciliationJob will have one of those 5 statuses which are :

Upcoming:	when the ReconciliationJob date is future date
Start:	when the ReconciliationJob date is past or today’s date
Inprogress:	when the ReconciliationJob is already started
Completed:	when the ReconciliationJob is finished
Canceled:	when the ReconciliationJob is canceled by the user

ReconciliationJob with the statuses upcoming ,start and in progress will be shown in Upcoming tab and completed,canceled ReconciliationJobs will be available in past tab

If ReconciliationJob with schedule 2 drugs is opened then only schedule 2 drugs which are present in inventory will be fetched in detail screen and if user want to add new schedule 2 drugs then by clicking ‘Add’ button it will open drug advance search screen with schedule 2 drugs now user can select the drugs and add those in reconciliation list.

ReconciliationJob with name initialization will be created only once after ReconciliationJobScheduler is newly created,this job will not have some columns which will be present in ReconciliationJob with name ‘Reconciliation’.

Reconciliation type job will have additional columns like :

Last Reconciliation Date
Last On Hand Qty
Purchased Qty Since Last Reconciliation
Dispensed Qty Since Last Reconciliation
Expected Qty On Hand
So that user can have information about last reconciliation
We have a non-editable section for those NDC’s which are reconciled. For Example if a user wants to do reconciliation of 100 NDC’s and for some reason succeeded in reconciliation of 70 NDC’s then those 70 NDC;s will go in the non-editable section after 24 hours.

NDC’s can’t be inserted in the non-editable section; it's a read only view section and users can only have excel sheets of records present on the screen after a click on export button.

We have three columns namely dispensed,adjusted and purchased since last reconciliation these columns will show count from last reconciliation and on a click on that value it will show the detailed view of related transactions.

On Reconciliation Detail screen user can search as per the NDC or drug name,if user mistakenly enters NDC out of schedule criteria and then will get error message and if entered NDC which is not managed in inventory then will get a confirmation message of whether you want to add this NDC in the list or not
If selected yes that drug will be added in the list

If any task is started on the day but not finished on the same day. Then the data which is saved will move to the non-editable section.

In past tab the completed ReconciliationJob will have drugs but no updations can be performed on this screen but user can export the data in excel report after a click on ‘export’ button

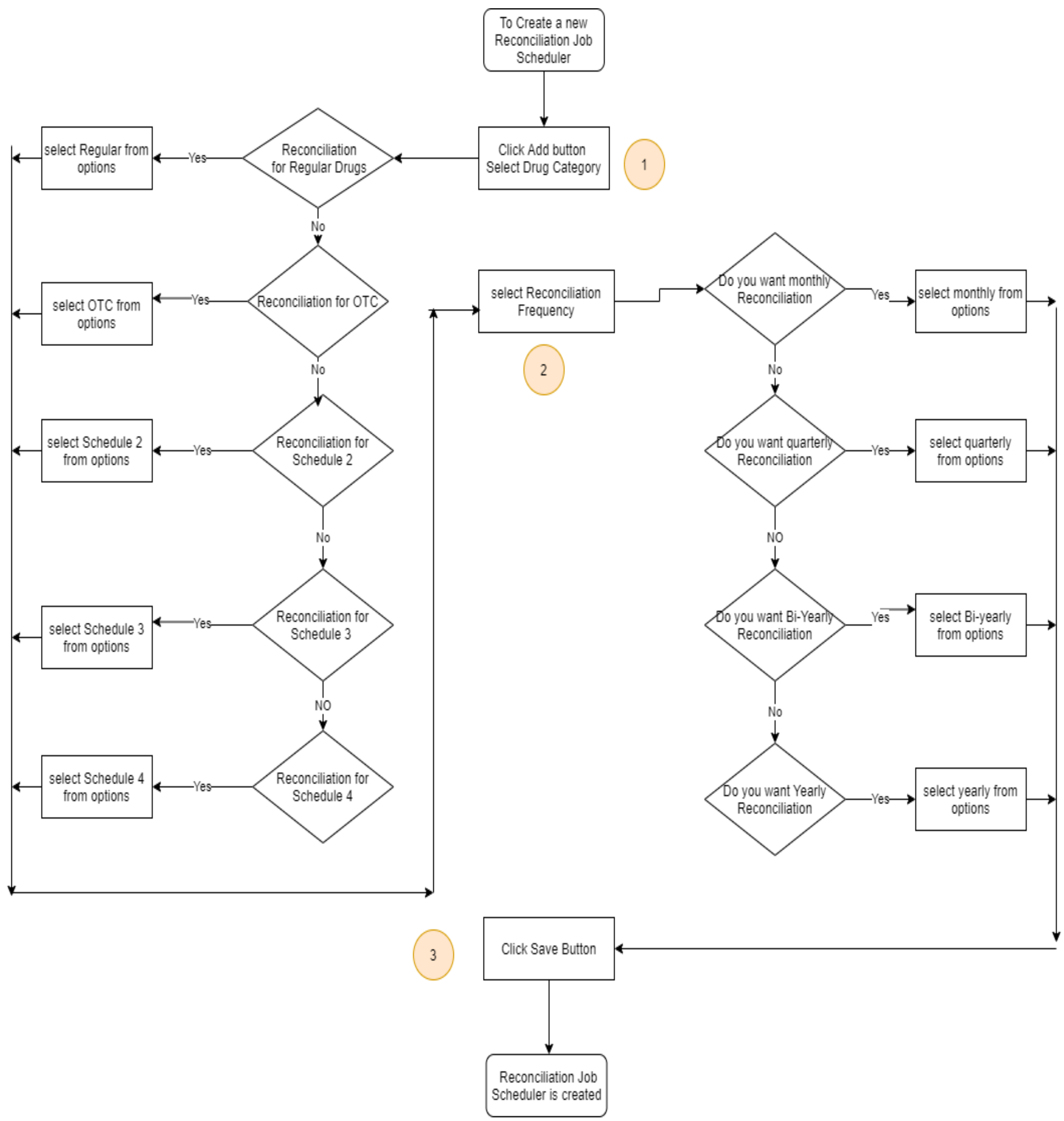
Drugs in the reconciliation list can also be updated in inventory by entering actual quantity, checking update checkbox and entering note and then clicking save button.

Those Drugs which don’t have any discrepancy can also be saved just by providing actual quantity on hand and clicking save button

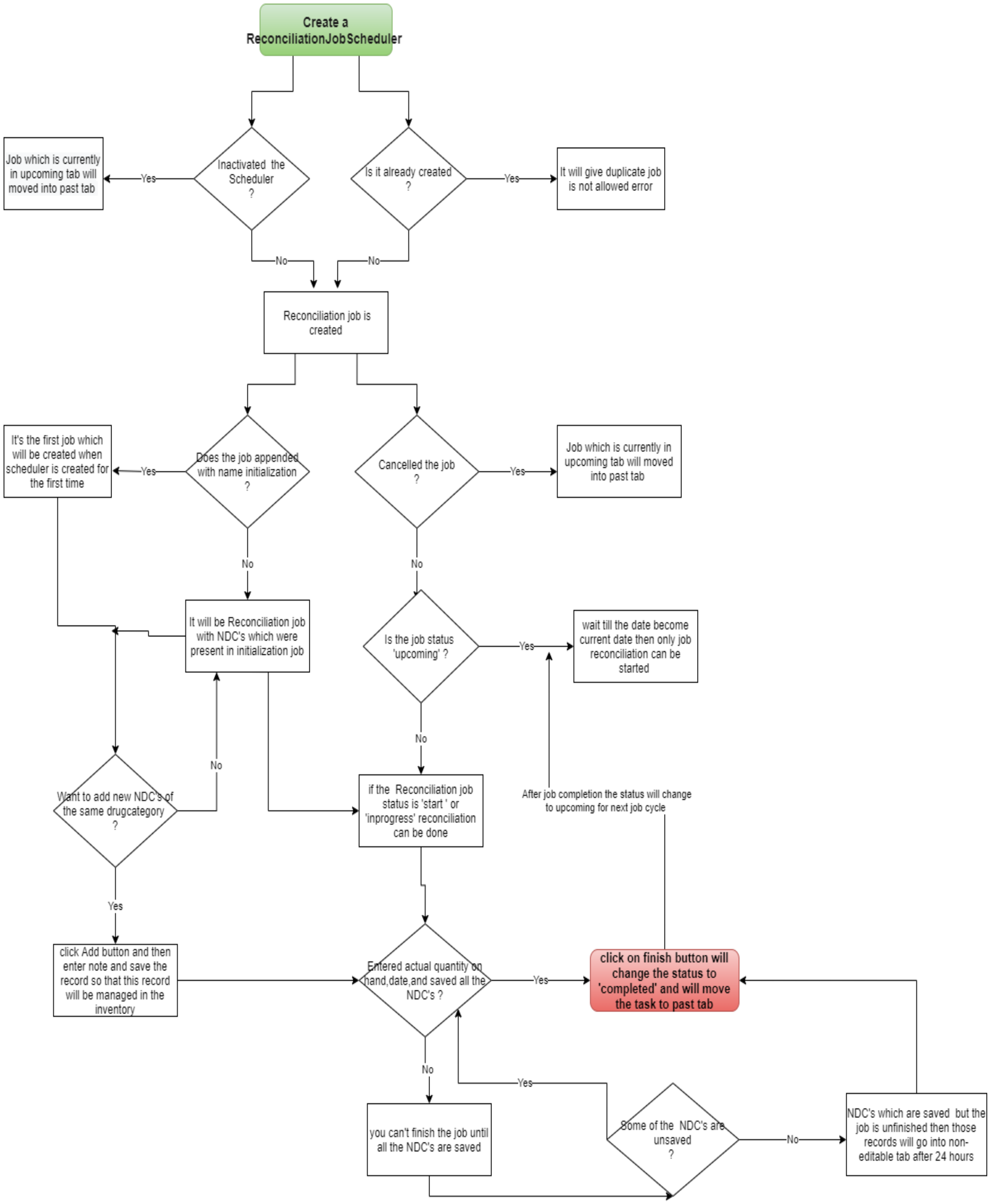
To finish any ReconciliationJob user have to insert actual quantity values for all the present NDC’s in the list and then can click finish button to complete the ReconciliationJob

Users can also activate/inactivate the ReconciliationJobScheduler by default it will be activated,
If inactivated then associated ReconciliationJob will be moved to the past tab with status cancelled and all the information inside the ReconciliationJob will also be lost.

If user activate the ReconciliationJobScheduler again then associated ReconciliationJob will be created with valid data



To Create a new Reconciliation Job Scheduler
Click Add button Select Drug Category
1
Reconciliation for Regular Drugs
Yes
select Regular from options
No
Reconciliation for OTC
Yes
select OTC from options
No
Reconciliation for Schedule 2
Yes
select Schedule 2 from options
No
Reconciliation for Schedule 3
Yes
select Schedule 3 from options
NO
Reconciliation for Schedule 4
Yes
select Schedule 4 from options
select Reconciliation Frequency
2
Do you want monthly Reconciliation
Yes
select monthly from options
No
Do you want quarterly Reconciliation
Yes
select quarterly from options
NO
Do you want Bi-Yearly Reconciliation
Yes
select Bi-yearly from options
No
Do you want Yearly Reconciliation
Yes
select yearly from options
3
Click Save Button
Reconciliation Job Scheduler is created



Create a ReconciliationJobScheduler
Inactivated the Scheduler ?
Is it already created ?
Job which is currently in upcoming tab will moved into past tab
It will give duplicate job is not allowed error
Yes
Yes
No
No
Reconciliation job is created
Does the job appended with name initialization ?
Cancelled the job ?
It's the first job which will be created when scheduler is created for the first time
Job which is currently in upcoming tab will moved into past tab
Yes
Yes
No
No
It will be Reconciliation job with NDC's which were present in initialization job
Is the job status 'upcoming' ?
wait till the date become current date then only job reconciliation can be started
Yes
No
No
Want to add new NDC's of the same drugcategory ?
if the Reconciliation job status is 'start ' or 'inprogress' reconciliation can be done
After job completion the status will change to upcoming for next job cycle
Yes
click Add button and then enter note and save the record so that this record will be managed in the inventory
Entered actual quantity on hand,date,and saved all the NDC's ?
Yes
click on finish button will change the status to 'completed' and will move the task to past tab
No
Yes
you can't finish the job until all the NDC's are saved
Some of the NDC's are unsaved ?
No
NDC's which are saved but the job is unfinished then those records will go into non-editable tab after 24 hours

Purchasing

Marketplace:

- From here users can view different substitutes of the same drug,like generic equivalents of that drug or the same drug from other wholesalers.
- Users can also add to cart the required drugs.

Steps to follow:

1. Select Pharmacy
2. Input Filters:
    a. NDC
    b. Drug
    c. Manufacturer
    d. Catalog no
3. Click filter button

Above steps will fetch results in tabular format and users can select according to needs and add to cart drugs.

To view the generic equivalent of a drug click on the arrow present before that NDC row.. Here one row will be highlighted with green color to show the lowest invoice cost drug.

If purchase order is already contains a drug and user is trying to add the same drug in the cart it will give a warning message “NDC/generic equivalent has already been ordered today”,from here if user still want to order the same NDC then user can can click yes button and can order that NDC.

If a user clicks on “Qty on Hand '' (Bill/Fill based on pharmacy inventory specs) column value and if it's any value other than initialize then the user will not be able to initialize that NDC again if tried then it will give an alert that Duplicate Drug Adjustment Initialize is not allowed.

Users can click on “Qty on Hand” column value and can perform drug adjustment transaction types.

On clicking “more wholesaler icon” it will give the same NDC with different wholesalers, so that users can select as per requirement.

After adding a drug/NDC in the cart it will turn the cart icon into green color,and the same drug now will be available on cart screen.

The cart icon will be disable till there is no quantity added or specified for that drug.

Users can also add to cart ndc/drugs for different departments which come under the pharmacy.

If the user changed the department from dropdown and added any ndc to cart then that ndc will be added for that department only and not other departments.

Available Submodule:

- ## Pre-order list

To keep a list of drugs which are needed to order frequently.
Users can also have a list of the deleted drugs list within the last 24 hours.
Once a list is ready users can directly search that list in the marketplace and can add to cart drugs.

Steps to follow:

1. Select Wholesaler
2. Select :
   a. NDC
   b. UPC
   c. catalog no.
   d. quantity
3. Click Add item Button.

Above steps will add items to the Pre-order list.

To clear the list click the “clear queue” button

If the user enters the same NDC which is present in the pre-order list again in the input NDC field and clicks the “Add Item” button then it will increment the “order quantity” column value and will not add a new row for the same NDC.

Pre-order list items will be searched in the marketplace only if the checkbox in front of that item is checked otherwise it will not be searched in the marketplace.

If a user enters the same NDC but with a different wholesaler name it will give an alert that “Same Item with another Wholesaler exists”.

If there are some quantities are available for a given NDC and user clicks on “Qty on Hand” (Bill/Fill based on pharmacy inventory specs) value and choose Type of transaction as Drug initialize then it will give an alert “Duplicate drug adjustment is not allowed”

From the pre-order list to purchase order screen a user can have a section for department under pharmacy and can make list of drugs which they want to order for particular department and search in marketplace then add to cart that drugs and place order wholesaler wise and all this flow will be independant for each department of particular pharmacy.

After placing an order each order will have an order number in combination with department name to identify each order separately.

Cart:

- To manage cart items.
- To place orders for cart items.
- Users can also sort cart items.
- Users can see details related to drug entries like total cost of purchase order and unit cost of each item by searching that item with given filters.

Steps to follow:

To get any drug on the cart screen first need to click the “Cart icon” which is present on the Marketplace screen.

1. Select Pharmacy Location.
2. Input Filters:
    a. Catalog no.
    b. NDC
    c. Drug
    d. wholesaler
3. Click the “Place order” Button.

Above steps will place an order.

If the user clicked the delete button then that NDC row will be deleted from the cart screen.

This screen has live count changing of cart items,even if there are multiple users on the same screen and performing operations on cart screen it will reflect all the changes done by each user and all the user will get the latest data on screen with the help of .signal R library.

If NDC/Drug is available on cart screen and the user clicks the “place order” button, but in the purchase order info section if the checkbox in front of the wholesaler is unchecked then it will give an alert that “select atleast one wholesaler.”

In the purchase order info section “Purchase order total amount” will be the sum of values of column “total cost” of all the drug presents.

By clicking the plus/minus button in the “Quantity ” column, users can increment/decrement drug value to be ordered.

To see whether a specific NDC is present in cart or not just take NDC/Catalog number/Drug and put in given input filter boxes and it will automatically search for that NDC without clicking any button.

If checked the DNS checkbox then the wholesaler can not send a generic equivalent of that NDC but if DNS is unchecked then a generic equivalent of that can be sent if the original NDC is not present.

Purchase Summary:

- Used to track purchase order.
- It shows whether an order is Acknowledged, Shipped or invoice for that order is processed or not.
- Also displays Purchase order by wholesaler and as per order date.

Steps to follow:

1. Select Pharmacy Location
2. Input Purchase Order no
3. Select :
    a. Wholesaler
    b. order date period
4. Click filter button

If there is any discrepancy in invoice or acknowledgement or shipment then after hovering over that icon it will show the reason why the discrepancy occurred.

Available Submodule:

- Purchase Detail

To give detailed information about a purchase order.

How many NDC's are present in that purchase order and their manufacturer,quantity, net cost and total cost of the purchase order.

To access this screen click on the value of "Purchase number" column.

Arrow present before the catalog number will show detailed information about Acknowledgement, shipment and invoice.

Invoice Summary:

- To keep track of invoices (which are generated from pharma pro portal or from any other website)
- Users can see information related to invoices like invoice date,cost of invoice and also source of invoice.

Steps to follow:

1. Select Pharmacy Location
2. Input Filters:
   a. Invoice no.
   b. Purchase order no.
3. Select:
   a. Wholesaler
   b. Date type
   c. Date period
4. Click filter button

Above steps will fetch data on screen.

Available Submodule:

- Invoice Detail

To give detailed information about an invoice.

How many NDC's are present in that invoice and their manufacturer,quantity, net cost and total cost of that invoice.

To access this screen click on the value of the "invoice no" column.

- Manual Invoice

To prepare an invoice manually from pharma pro portal.

Steps to follow:

1. Select Pharmacy Location
2. Select wholesaler
3. Input Account no.
4. Select Invoice Type
5. Input Invoice no.
6. Input Purchase order no.
7. Select Invoice date
8. Select cost
9. Click Add button

10. Select Drug
11. Input Datalog no.
12. Input Pack units
13. Input Unit cost
14. Click Save Button

Above steps will create a manual invoice.

Shipment Tracking:

- To keep track of shipments as per purchase order.
- Users can also get information in XLS format.
- Sheet will contain transaction information like po number,invoice no,shipment date,seller and buyer. information and all the information in detailed format.

Steps to follow:

1. Select Pharmacy Location
2. Input filters
    a. NDC
    b. Drug
    c. Po number
    d. Date period
3. Select:
    a. Wholesaler
    b. Shipment date period

Above steps will fetch shipment details and to download PDF click on “PDF icon” in PDF column

By clicking on the value of “Shipped qty” column it will open shipment details and this same information will be available in XLS format after clicking on the PDF icon.

Setup

Pharmacy:

- To manage pharmacy locations
- Users can add/edit and search a pharmacy location.

Steps to follow:

1. Input Filters:
    a. Pharmacy name
    b. NCPDP ID
    c. NPI
2. Select Status
3. Click filter button

Above steps will fetch pharmacy location if present.
To edit pharmacy related information click “edit” icon.

Available Submodule:

- Add Pharmacy

To add a new pharmacy location.

Steps to follow:

1. Input Pharmacy location name
2. Input NCPDP ID
3. Input NPI
4. Select Inventory start date
5. Select inventory Reconciliation
6. Check or uncheck the checkbox of Active
7. Select Save

Above steps will create new pharmacy locations.

User:

- To create new user so that it can login and use this portal
- Edit/Search user profile related information
- Users can get to know which Pharmacy location's access a user has access to..

Steps to follow:

1. Input Filters:
   a. Last name
   b. First name
   c. Username
2. Select:
   a. Status
   b. User role
   c. Location access
3. Click filter button

Above steps will fetch user related information.
To edit user information click the edit icon.

Available Submodule:

- Add user

To create a new user profile.

Steps to follow:

1. Input First Name/Last Name/Email
2. Select User role
3. Input Username
4. Select Password options (Temporary/Email)
5. Input Password and check checkbox "change password at next login" (Temporary)
6. Uncheck checkbox "change password at next login" (Email)
7. Select "Active" Checkbox
8. Select location from location tab
9. Click transfer button (It will transfer that location in location access tab)
10. Click checkbox in front of pharmacy location access (This will make this pharmacy location default for that user)
11. Click Save button

After creating a user by using the username and password it will be able to log into the portal.

If the user select them temporary password as an option then he/she has to specify the temporary password to logging in first time and after login portal will give a pop up window asking for password change and using that window user can change the temporary password

If the user selects email as an option for password then he/she will get a link to change the password and can create a new password for login,this password change link will be valid for 24 hours only.

If the" Default "checkbox is unchecked before pharmacy location it will give an alert that default location access is required.

Search bar will only give results when there is a location in the" Location "portion and not in the "Location access" portion.
While creating/updating a user "user role" value will decide the scope of the application for that user.

By clicking on location access icon it will show location access that user have

We can search for users by "user role" of that user as well as "location access" to that user.

Email:

- To add/edit email information for specific wholesalers.
- Users can get information about cart items, order acknowledgement and can place purchase order over an email

Steps to follow:

1. Select Pharmacy
2. Click filter button

Above information will give information related to emails like email addresses of recipients and email type. To edit information click on the edit icon.

Available Submodule:

- Add Email

Steps to follow:

1. Select Pharmacy
2. Select Email Type
3. Select To Email Address
4. Select CC Email Address
5. Check/Uncheck “Active” Checkbox
6. Click Save button

During creating a new email user will have an option to assign email addresses as new email addresses or can select from already created email addresses.

One client login can have three types of emails per pharmacy; this will be applicable when email types will be one of “order acknowledgment” or “cart remainder”.

When the email type will be “place order” users can have as many numbers of emails as it has wholesalers mapped with the given pharmacy.

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User Role:

- To restrict which user will have access to what features of an application
- Search for specific user role to see which screen access that user has
- Users can also edit and delete user role

Steps to follow:

1. Click “Add user role” button
2. Input Filters:
    a. Name
    b. Description
3. Click Save button

Above steps will create a new user.

To give access to screen select checkbox in front of that screen then click “Save” button

To search for a user role click on search icon and input user role name

If a user is logged in with a user role which has limited screen access then this user cannot give access to screens which are not accessible to the newly created user.

If access of base module or root module is given then user will get the access of all the submodules also

Duplicate User Roles are not allowed.

If a user is logged in then he will be able to see only those screens as well as those actions to which he has access to.

User role limit will be stored in the database and if the user tries to create user roles more than the allowed limit the user will get a warning message that “you have reached the maximum user limit”.

Configuration:

- To manage pharmacy and wholesaler map
- search/map/Edit wholesaler for a specific pharmacy

Steps to follow:

1. Select:
   a. Pharmacy
   b. Status
2. Input Account number
3. Click filter button

Above steps will fetch information related to pharmacy-wholesaler map
To edit information click edit icon

Available submodule:

- Map Wholesaler

1. Select Pharmacy
2. Select Wholesaler'
3. Input Parent Account number
4. Input child Account number
5. Select Priority
6. Input SFTP Host
7. Input SFTP User
8. Input SFTP password
9. Input SFTP inbound directory
10. Input SFTP outbound directory
11. Input Local directory
12. check /uncheck “Active“ checkbox
13. Check required checkboxes out of 832/850/855/856/810/180/DFD/DBD (so that wholesaler map can process checked checkboxes)
14. Click Save button

Above steps will create new wholesaler map with pharmacy

“Timezone” select option will only be enabled after giving the “Order Cutoff Time”.

If any one of the EDI options is left unchecked while creating/updating wholesaler map then that EDI will not be parsed for that Wholesaler map.

Column toggler will be available on most of the screens which will be used to select and deselect columns which the user wants to see on the screen.

To save changes made for column selection from column toggler feature click filter or reset button.

Drug Order: