

## Will Call Overview

The Will Call task is the last step in the prescription filling process. At Will Call, you search for and select the patient who is ready to pick up prescriptions. If other patients who live at the same address as the selected patient have prescriptions ready to be sold, the system allows you to select those prescriptions as well. If any of the prescriptions are eligible for a refill service (AutoFill™ and AutoMail™), the system allows you to set up refill service options. Then, to sell the prescriptions out of Will Call, you obtain the pickup signature and any other signatures required for refill services or HIPAA documents.

For an overview of each potential step in the Will Call process, see [Basic Will Call Steps](#).

### See Also

[Prescription Selection Window](#)

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## Basic Will Call Steps

The following is the basic procedure for processing an order at the Will Call station. For more information about each step, refer to the corresponding topic.

### To process an order at Will Call:

1. On the Welcome window, select **Will Call**.
2. On the Will Call Patient Search window, enter search criteria, then search for and select a patient. Then select **Next**.

See [Select Patient at Will Call](#).

#### Notes:

- You can search for prescription or transaction numbers that are deactivated, currently in Will Call, or in workflow.
  - To return to a previous window during a Will Call task, select **Back**. To return to the Welcome window, select **Back to Home**.
3. If other patients who live at the same address as the selected patient have prescription(s) currently in Will Call, the system displays the Will Call Additional Patients window. To sell the prescription for the additional patient(s), select the checkbox beside each name, then select **Next**.

See [Select Additional Patients](#).

If messages exist about which you need to inform the patient, the system displays the Patient Messages window.

4. Click each message and select **OK**. Then, select **Next**.

See [Review Notes and Messages](#).

5. On the Prescription Selection window, review each prescription the patient has in Will Call. For each prescription that is ready to be sold, the system displays a checkmark in the **Sell** column. If the patient is not ready to pick up one or more prescriptions, clear the **Sell** checkbox for those prescriptions. The system leaves these prescriptions in Will Call. When you are ready to proceed to the next step, select **Next**.

See [Select Prescriptions](#).

6. For prescriptions that require pharmacist counseling (the **Counseling** column is set to **Required**), select **Pharmacist Counseling**.

See [CallCounsel a Patient From Will Call](#).

7. If any of the selected prescriptions are eligible to be enrolled in a refill service (AutoFill or AutoMail), the system displays the Will Call Refill Service window. Set up the refill service settings as needed, then select **Next**.

See [Set Up Refill Service](#).

8. On the Will Call Signature Capture window, obtain the patient's pickup signature and signature(s) for any additional documents that exist. Obtain the signatures and update the status of each document signature record as needed.

See [Obtain Patient Signatures](#).

9. Select **Complete**.

The system displays the Will Call Patient Search window so you can start another Will Call task. To return to the Welcome window, select **Back to Home**.

## Select Patient at Will Call

When you select **Will Call** on the Welcome window, the system displays the Will Call Patient Search window, where you can search for and select the patient whose prescriptions you want to sell.

### To select a patient:

1. Do one of the following:
  - If you have a prescription or transaction number for the patient, you can leave the criteria fields blank and scan the prescription or transaction number or type the number in the **KP RX or TX Number** field and select **Enter**.  
**Note:** You can search for prescription or transaction numbers that are deactivated, currently in Will Call, or in workflow.
  - Enter the selection criteria to use to search for the patient.

**Note:** You can enter full or partial criteria in all of the fields in the Search for the Patient section.

2. After you enter all criteria you want to use, press **Enter** or select the search icon.

The system displays all of the patients that match the criteria you entered in the Results List table.

2. Highlight the patient and select **Next**.

## Select Additional Patients at Will Call

On the Will Call Additional Patients window, the system displays patients with prescriptions in Will Call who live at the same address as the patient selected on the Will Call Patient Search window. You can select those patients and process their prescriptions.

### To select additional patients who have prescriptions in Will Call:

1. Choose the **Select** checkbox to select a patient and process their prescriptions.
2. Select **Next**.

## **About Verifying Identification**

You must verify and enter identification of the person picking up prescription on the ID Required window at Will Call in two situations: when the patient specifically requests it and when the drug dispensing rules require it.

## Patient Request

On the Patient Additional window, the **Require ID at Pickup** option determines when a person picking up prescriptions must present an ID. You must verify and enter patient identification if the **Require ID at Pickup** option is one of the following options and the prescription meets this criteria:

- All Prescriptions
- Schedule 6 and below
- Schedule 5 and below
- Schedule 4 and below
- Schedule 3 and below
- Schedule 2 only

## Drug Dispensing Rules

Your Host system defines dispensing rules for specific drugs, GPI ranges, or drug schedules at the state or country level. If the **Driver's License** option in the General Rules section of the Drug Rules window is set to **Required**, you must verify and enter patient identification of the person picking up prescriptions that meet the criteria.

**Note:** For more information on defining the dispensing rules for drugs, refer to *EPS Dispensing Rules* in volume 2, section 1, chapter 2 of the *PDX Host System Manual*.

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## Verify Identification at Will Call

You must verify and enter identification of the person picking up prescription in two situations: when the patient specifically requests it and when the drug dispensing rules require it. The system displays the ID Required window in the Will Call process when you must verify and enter identification information.

### To enter identification information for the person picking up prescriptions:

1. In the **ID Number** field, enter the identification number from the identification card the patient presents to you.
2. In the **Expiration** field, enter the expiration date from the identification card.
3. In the **Name on ID field**, enter the name as it appears on the identification card.
4. Enter any additional information, as needed.
5. Select **OK** to return to the Will Call Prescription Selection window.

### See Also

[About Verifying Identification](#)

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## Review Patient Messages

On the Patient Messages window, the system displays messages that you need to convey to the patient. The system requires that you select each message to continue with the Will Call process.

### To process messages on the Patient Messages window:

1. Click each message.

After you click each message, the system enables the **OK** button.

2. Select **OK**.

## Select Prescriptions at Will Call

On the Will Call Prescription Selection window, review each prescription the patient has in Will Call and verify which prescriptions the patient is ready to pick up.

### To select prescriptions to be sold:

1. Verify that the patient wants to pick up all of the prescriptions with a checkmark in the **Sell** column in the Current Prescriptions table.

**Note.** To review any messages regarding the patient that are assigned to display at Will Call, select **Show Messages**. To change the billing information for a prescription, highlight the prescription and select **Change Billing**. To view additional information for a prescription, highlight the prescription and select **View Rx Detail**.

2. If the patient does not want to pick up a prescription, clear the checkbox in the **Sell** column for that prescription.
3. To indicate that the patient accepted or refused counseling for a prescription, do the following.
  - a. Highlight the prescription.
  - b. Set the **Counseling** option to **Accepted** or **Refused**.  
**Note:** You must select either **Accepted** or **Refused** to continue to the next step in the Will Call process.
4. To indicate whether the patient wants safety caps for a prescription, do the following.
  - a. Highlight the prescription.
  - b. Set the **SC** option to **Yes** or **No**.
5. If the patient is enrolled in the AutoPay service, inform them of the amount that will be charged to their credit card. The system displays this amount in the AutoPay (AP) field in the lower-right portion of the window.  
  
If the patient does not want to charge the amount to their credit card, clear the **Charge Credit Card on File** checkbox.
6. Select **Next**.

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## Set Up Refill Services at Will Call

The Will Call Refill Service window lets you set up the refill service settings (AutoFill or AutoMail) for a prescription.

### Notes:

- Before enrolling a patient in AutoFill, you must first enable AutoFill in EPS. To do so, set the **Enabled** drop-down list to **Yes** in the AutoFill section on the Special Services window (Administration > Application Settings > Special Services). See [Special Services Window](#).
- Before enrolling a patient in AutoMail, you must first enable AutoMail in EPS. To enroll a patient in AutoMail, you must set both **Enabled** drop-down lists to **Yes** in the AutoFill and Fulfillment sections on the Special Services window.
- You can also set up the refill service by selecting **Filecabinet > Patient > Refill Service**.

### To define the Refill Service settings for a prescription:

1. Highlight the prescription and set the **Refill Service** option to **AutoFill**, **AutoMail**, or **Refused**.

**Note:** The default setting for the **Refill Service** option is **Ask**.

2. In the **Refill Quantity** field, enter the quantity to dispense for the next fill of the prescription (if different from the original dispensed quantity).
3. To determine how the system processes prescriptions that are out of refills, set the **No Refill Option** to one of the following:
  - To generate a Call Prescriber task to request refills, select **Call Prescriber**.
  - To generate a Call Patient task to inform the patient, select **Call Patient**.
  - To prevent the system from filling the prescription, select **Do Not Fill**.
4. Review the information in the Refill Service Information for [*Patient Name*] section.
  - To select a different address to use as the patient's shipping address for home-delivery prescriptions, select **Patient Address**.

The system displays the Patient Address window, which lists all addresses on file for the patient.

- To select a credit card to use for billing charges for home-delivery prescriptions, select **Patient Credit Card**.

The system displays the Patient Credit Card window, which lists all credit cards on file for the patient.

**Note:** The patient must have a valid credit card on file to set up a prescription for the AutoMail service.

- To view additional prescriptions on the patient's profile that are eligible for refill services, select **Additional Rxs**.
5. Review the information in the Refill Service Messages section. To change the method by which the patient wants to receive messages, select **Edit**.
  6. Select **Next**.

## See Also

[Refill Service Window](#)

## About Signature Capture

As the last step in the Will Call process, you collect signatures from the patient for picking up the prescription, enrolling in a refill service, and acknowledging the receipt of HIPAA documents or informational leaflets.

EPS provides different methods for obtaining patient signatures: fully electronic using a signature capture pad, partially electronic using a printer and a document scanner, or a manual method. You define the signature capture method for your system using the Signature Capture window in Communication Settings. The methods are as follows:

- **Manual** With this method, you provide the patient with printed documents to sign and file the signed documents in a designated place. There is no image of the patient's signature stored on the system.
- **Pharmacy Signature Capture**  
With this method, you obtain signatures using a device attached to your pharmacy system.
- **POS Signature Capture**  
With this method, you obtain signatures using a device attached to your POS system.
- **Scanner**  
With this method, you provide the patient with printed documents to sign and scan the signed documents into the system using a document scanner.

For each method other than the manual method, the system saves an image of the signature and attaches it to the appropriate record in the system. For example, the system saves the pickup signature image to the transaction record, the signature authorizing enrollment in a refill service to the prescription record, and signatures acknowledging the receipt of HIPAA documents to the patient's signature profile.

## Will Call Signatures Status

In the Document List section of the Signature Requests table, the system displays each document, or group of documents, the patient is requested to sign.

If the status of any document is set to **Pending** when you enter the window, you must set the status for the system to enable the **Complete** button so you can finish the Will Call task.

There are two ways to set the status in the Signature Requests section of the window, depending on how you obtain the patient's signature.

### Electronically

If you obtain a signature for a document electronically using a scanner or a signature capture device, the system sets the status to **Acquired** for that document.

### Manually

Do one of the following:

- If you obtain the signature manually during the Will Call task, manually set the status to **Acquired**.
- If you cannot obtain a signature for a document, manually set the status to indicate the reason. For more information, see [Obtain Patient Signatures](#).



## Obtain Patient Signatures

To obtain a patient signature on the Will Call Signature Capture window:

1. In the **Signature Capture Mode** section, select a different mode if needed.

The system defaults to the mode defined for your system in Communication Settings.

2. If you **cannot** obtain a signature, set the status for each document or group of documents to one of the following:
  - **Not Present** = patient was not present to sign the document; the system displays the document on subsequent fills
  - **Refused** = patient refused to sign the document; the system does not display the document on subsequent fills
  - **Mailed** = document was mailed to the patient
  - **Hard Copy Provided** = document was provided to the patient  
**Note:** If you acquire oral authorization for each item in the document list, you can set the status at the top of the table, which sets the status of the entire list.
3. If you **can** obtain a signature, do one of the following for the signature capture method you use:
  - **Manual Signature Capture** - Set the status to **Acquired**. Have the patient sign the document and file it in the designated place in your store.
  - **Scanner Signature Capture** - Highlight the document and select **Print** to print a signature page for the document. The system includes a barcode on the signature page that it uses to associate the signature with the document. Ask the patient to sign the signature page and scan it. After you finish scanning the page, the system sets the status to **Acquired**.
  - **Signature Capture Device** - Select **Acquire Signature** and instruct the patient to sign the signature pad. After the patient signs the pad and selects **OK**, the system sets the status to **Acquired**.

**Note:** For more information on the various methods you can use to obtain signatures, see [About Signature Capture](#).

4. After you obtain all of the necessary signatures, select **Complete** to finish the order.

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## Billing Change Overview

The Billing Change window lets you select a patient's secondary and tertiary third party to split bill a prescription previously billed to the primary third party. Also, if you fill a prescription as cash and the patient later brings in an insurance card, you can change the billing for the prescription from cash to third party.

### Billing Change Requirements

To determine whether you can change the billing for a prescription, the system checks the following.

- The prescription must be in Will Call.

If the prescription not currently in Will Call, the system displays **The Billing Change function is only for prescriptions that are in Will Call. Cannot Proceed.**

- The prescription cannot be in progress at a fulfillment facility.

If the prescription is currently in progress at a fulfillment facility, the system displays **This prescription is being processed by the fulfillment facility. Cannot proceed.** After you receive a prescription from the fulfillment facility, the system allows you to change the billing.

- The system prevents you from changing the billing in certain scenarios for partial fill prescriptions. For more information, see [Billing Change Scenarios for Partial Fill Prescriptions](#).

### See Also:

[Change Billing from Cash to Third Party](#)

[Change Billing from Third Party to Cash](#)

[Change Billing from Third Party to Third Party](#)

[Billing Change Window](#)

## Billing Change Scenarios for Partial Fill Prescriptions

The following describes the various scenarios that can occur when you attempt to change the billing for a partial fill prescription.

**Note:** An insurance plan supports NCPDP partial fill billing if the **Allow Partial Fill** checkbox is selected on the Insurance Plan Information window. With NCPDP partial fill billing, you bill the partial and completion fill transactions separately.

From Transaction Type	To Transaction Type	Allowed?	System Response
Cash	Non-NCPDP	4	The system enters a price of \$0.00 on the partial transaction and bills the full amount of the prescription on the completion transaction.
Non-NCPDP	Cash	4	The system transmits a claim reversal for the partial transaction and reprices this transaction as cash.
NCPDP	Cash	4	The system transmits a claim reversal, reprices the full cash amount on the partial transaction, and enters a price of \$0.00 on the completion transaction
Non-NCPDP	NCPDP	6	If you attempt to change the billing, the system displays <b>Cannot change billing on a non-NCPDP partially filled transaction to a third party that allows NCPDP partial fills. Return the transaction to Data Entry and reprocess with the correct Third Party.</b> Select <b>OK</b> to return to the Will Call Prescription Selection window and select <b>Return to Data Entry</b> to reprocess the prescription and bill it to the new third party.
NCPDP	Non-NCPDP	6	If you attempt to change the billing, the system displays <b>Cannot change billing on an NCPDP partially filled transaction to a third party that does not allow NCPDP partial fills. Return the transaction to Data Entry and reprocess with the correct Third Party.</b> Select <b>OK</b> to return to the Will Call Prescription Selection window and select <b>Return to Data Entry</b> to reprocess the prescription and bill it to the new third party.

## Change Billing from Cash to Third Party

If after you fill a prescription as cash you want to submit the claim to one or more third parties, use the Billing Change window. For more information on the requirements a prescription must meet to change the billing, see [Billing Change Overview](#).

### To change the billing for a prescription from cash to third party:

1. Select **Change Billing** on the Will Call Prescription Selection window.

The system displays the Billing Change window.

2. Scan the prescription or transaction number in the **Rx Number** field or type the number and select **Enter**.
3. If you enter the prescription number and there are multiple transactions in Will Call, the system displays a list of the transactions on the Transaction List window so you can select the correct transaction to rebill.

The system displays the Current Billing and Prescription information.

4. Select the patient's third party from the **Primary Third Party** option.
5. If needed, select the patient's additional third parties.

**Note:** The system displays only third parties that allow split billing (**Coordination of Benefits (CoB) – Allow as secondary or tertiary plan** checkbox is selected on the Insurance Plan Information window).

6. Select **Submit**.

The system does the following:

- creates a new transaction with the information from the original transaction including DURs and prescription edits
- recalculates the price of the transaction
- reverses any credit card charges for the AutoPay service on the original transaction
- transmits the new claim to the third party

When you receive a response, the system displays the results in the

Adjudication Results section.

7. Review the adjudication results:

- If adjudication is successful, the system cancels the original transaction. Review the adjudication results and select **Done**. The system prints a new receipt.
- If the adjudication failed, the system allows you to do one of the following:

Select a different third party (if available) and select **Submit**.

Select **Use Original Billing** to retain the original billing for the prescription.

Select **Return to TP Exception** to send the prescription to the Third Party Exception station (use this option to change core prescription information, such as the drug).

**Note:** If you use this option for an expired prescription, the system displays **Rx expired on [expiration date]. Will not be able to fill the Rx if returned to TP Exception?** Select **OK** to return to the Will Call Billing Change window.

Select **Edit Claim** to display the Billing Change TP Exception window (use this option to change only third party-related information). For more information, see [Edit Rejected Claim](#).

**Note:** If you sell the prescription as cash, the system cancels the new transaction. If you send the prescription to the Third Party Exception station, the system cancels the original transaction and uses the new transaction.

## Change Billing from Third Party to Cash

If after you submit a claim to the third party you want to fill the prescription as cash, use the Billing Change window. For more information on the requirements a prescription must meet to change the billing, see [Billing Change Overview](#).

### To change billing from third party to cash:

1. Select the **Change Billing** button on the Will Call Prescription Selection window.

The system displays the Billing Change window.

2. If needed, do one of the following to select the transaction for which you want to change the billing:

- Scan the prescription number in the **Rx Number** field or type the number and select **Enter**.
- If you enter the prescription number, the system displays a list of all transactions associated with the prescription in the Transaction List window so that you can select the correct transaction to rebill.
- Scan the transaction number in the **Rx Number** field or type the number and select **Enter**.

The system displays the Current Billing and Prescription information.

3. Set the **Primary Third Party** option to **Cash**.
4. Select **Submit**.

The system does the following:

- a. creates a new transaction with the information from the original transaction, including DURs and prescription edits
- b. recalculates the price of the transaction
- c. reverses any credit card charges for the AutoPay service on the original transaction
- d. transmits a reversal to all the third parties to which the original transaction was billed

If the reversal is successful, the system cancels the original transaction. Review the adjudication results and select **Done**. The system prints a new receipt.

If the reversal fails, the system creates a Third Party Exception task.

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## Change Billing from Third Party to Third Party

If after you submit a claim to the primary third party you want to submit the claim to a different third party or split bill the claim to other third parties, use the Billing Change window. For more information on the requirements a prescription must meet to change the billing, see [Billing Change Overview](#).

### To change billing from one third party to another:

1. Select the **Change Billing** button on the Will Call Prescription Selection window.

The system displays the Billing Change window.

2. Scan the prescription or transaction number in the **Rx Number** field or type the number and select **Enter**.
3. If you enter the prescription number and there are multiple transactions in Will Call, the system displays a list of the transactions on the Transaction List window so you can select the correct transaction to rebill.

The system displays the Current Billing and Prescription information.

3. Do one of the following:
  - To select a different primary third party, select the third party from the **Primary Third Party** option.

If you select a different primary third party, the system disables the **Secondary Third Party** and **Tertiary Third Party** options.

- To split bill the claim to a secondary third party, select the third party from the **Secondary Third Party** option.

**Note:** The system displays only the third parties that allow split billing (**Coordination of Benefits (CoB) – Allow as secondary or tertiary plan** checkbox is selected on the Insurance Plan Information window).

- To split bill the claim to a tertiary third party, select the third party from the **Tertiary Third Party** option.

**Note:** The system displays only the third parties that allow split billing (**Coordination of Benefits (CoB) – Allow as secondary or tertiary**

**plan** checkbox is selected on the Insurance Plan Information window).

4. Select **Submit**.

The system does the following:

- creates a new transaction with the information from the original transaction including DURs and prescription edits
- recalculates the price of the transaction
- reverses any credit card charges for the AutoPay service on the original transaction
- transmits the new claim to the third party

When you receive a response, the system displays the results in the Adjudication Results section.

5. Review the adjudication results:

- If adjudication is successful, the system transmits a reversal for the original transaction. If the reversal is successful, the system cancels the original transaction. Review the adjudication results and select **Done**. The system prints a new receipt.

**Note:** If the claim reversal fails, the system creates a Third Party Exception task.

- If the adjudication failed, do one of the following:

Select a different third party (if available) and select **Submit**.

Select **Use Original Billing** to retain the original billing for the prescription.

Select **Return to TP Exception** to send the prescription to the Third Party Exception station (use this option to change core prescription information, such as the drug).

**Note:** If you use this option for an expired prescription, the system

displays **Rx expired on** [*expiration date*]. **Will not be able to fill the Rx if returned to TP Exception?** Select **OK** to return to the Will Call Billing Change window.

Select **Edit Claim** to display the Billing Change TP Exception window (use this option if you need to change only third party-related information). For more information, see [Edit and Retransmit Rejected Claim](#).

**Note:** If you sell the prescription as cash, the system cancels the new transaction. If you send the prescription to the Third Party Exception station, the system cancels the original transaction and uses the new transaction.

## Edit and Retransmit a Rejected Claim

If you attempt to change the billing for a prescription and the third party rejects the claim, you can use this procedure to edit and retransmit the claim.

**Note:** Use this procedure only if you need to change third party-related information to resolve an adjudication failure. If you need to change core prescription information, such as the drug, select **Return to TP Exception**.

**To edit and retransmit a rejected claim from the Billing Change window:**

1. Select **Edit Claim**.

The system displays the Billing Change TP Exception window.

2. Select **TP Info**.

The system displays the Billing Change Third Party Info window. This window has the same fields and functions as the Data Entry Third Party Info window.

3. Change the information as needed on this window.
4. Select **Next**.

The system displays the Billing Change TP Exception window.

5. Select **Retransmit**.
6. If adjudication is successful, select **Complete**.

The system prints a new receipt and returns to the Will Call Prescription Selection window.

**Note:** If adjudication fails, the system displays **Adjudication failed, make additional changes and retransmit, or press complete Back to Task to return to the Change Billing screen**.

## Return Prescription to Data Entry

### To return a prescription to Data Entry:

1. On the Prescription Selection window, highlight the transaction you want to return and select **Return to Data Entry**.

If the transaction is a non-NCPDP **partial** fill, the system displays **Choosing to return a partially filled transaction to Data Entry will cancel the completion fill, and the prescription will be reprocessed through workflow as a normal fill**. Select **OK**.

If the transaction is a **completion** fill, the system displays **Choosing to return a completion fill transaction to Data Entry will cancel the partial fill, and the prescription will be reprocessed through workflow as a normal fill**. Select **OK**.

The system displays the Will Call - Return to Data Entry window, which lists reasons for returning the prescription. in the **Description** field.

2. Select a reason for returning to Data Entry.

The system enters the reason in the **Description** field.

3. If necessary, enter text to further explain the return in the **Description** field and select **OK**.

4. Select **Cancel Will Call**.

The system displays a confirmation message asking if you are sure you want to cancel.

5. Select **Yes**.

If the prescription is a non-NCPDP partial or completion fill, the system

- cancels the partial and completion fills.
- creates a new transaction and places in Data Entry for the full quantity

**Note:** The system does not send a reversal because the completion fill was not adjudicated.

If the prescription is an NCPDP partial or completion fill, the system

- cancels the partial or completion fill as appropriate.
- creates a new transaction and places in Data Entry for the full quantity

6.

## Billing Change Window

To display the Billing Change window, select the **Change Billing** button on the Will Call Prescription Selection window.

**Note:** If you select **Change Billing** on a partial fill transaction, the system displays **Cannot change billing on a partial fill transaction. Select the completion file to change billing.**

The following describes the fields on the Billing Change window.

**Rx Number** Prescription or transaction number for which you want to change the billing. You can scan the number from the bottle label or type the number and select **Enter**.

Enter

Select to display the record for the prescription or transaction number you typed in the **Rx Number** field.

### Current Billing Information

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**Primary** Primary third party to which the claim was billed  
**Secondary** Secondary third party to which the claim was billed  
**Tertiary** Tertiary third party to which the claim was billed

### Prescription Information

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**Patient Name** Name of the patient for whom the prescription was filled  
**MRN** Patient's local or home medical record number  
**Drug Name** Name of the dispensed drug  
**Patient Pay** Amount the patient paid for the prescription

### New Billing Information

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**Primary (1) Third Party - Nonary (9) Third Party** Primary third party to which to submit the claim  
Note: You can only change the **Primary (1) Third Party** to **Cash** or another third party or add a new third party.

Patient Third Party

Select to display the Patient Third Party window, where you can add a new third party record for the patient.

Submit

Select to submit the claim to the selected third parties.

### Adjudication Result

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**Patient Pay** Amount the patient owes for the prescription  
Select to complete the Billing Change process.

Done

Use Original Billing

Select to retain the original billing for the prescription.

Return to TP Exception

Select to create a Third Party Exception task to resolve an adjudication failure.

Edit Claim

Select to change third party-related information to resolve an adjudication failure. If you need to change core prescription information, such as the drug, select the **Return to TP Exception** button.

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## Refill Service Window

In the Will Call process, the system displays the Refill Service window when you select **Next** on the Prescription Selection window if the patient is not already enrolled in any automatic refill services. The following describes the fields on the Refill Service window.

<b>Patient Name</b>	Patient's full name
<b>Rx Number</b>	Prescription number
<b>Drug Name</b>	Name of the dispensed drug
<b>Tx Quantity</b>	Quantity dispensed for this fill of the prescription
<b>Days</b>	Days supply of the drug
<b>Ref. Rem.</b>	Number of refills remaining on this prescription
<b>Refill Service</b>	Indicates the refill service the patient wants <b>Ask</b> = Technician/Pharmacist is to ask the patient if he or she want to enroll in a refill service (the default option) <b>AutoFill</b> = patient wants to enroll in the AutoFill service <b>AutoMail</b> = patient wants to enroll in the AutoMail service <b>Refused</b> = patient refused a refill service
<b>Refill Quantity</b>	Quantity to dispense for the next fill of the prescription (if different from the original dispensed quantity)
<b>No Refill Option</b>	Determines how the system processes prescriptions that are out of refills <b>Call Prescriber</b> = generates a Call Prescriber task to request refills <b>Call Patient</b> = generates a Call Patient task to inform the patient <b>Do Not Refill</b> = prevents the system from filling the prescription




### Refill Service Information for [Patient Name]

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<b>Address</b>	Patient's address
<b>Credit Card</b>	Patient/responsible party's credit card
<b>Patient Address</b>	Select to display the Patient Address window, where you can select a different address to use as the patient's shipping address for home-delivery prescriptions.
<b>Patient Credit Card</b>	Select to display the Patient Credit Card window, where you select a credit card to use for billing charges for home-delivery prescriptions.
<b>Additional Rxs</b>	Select to view additional prescriptions on the patient's profile that are eligible for refill service. The system displays the <a href="#">Patient Refill Service window</a> .

**Refill Service Messages** - Indicates the method by which the patient wants to receive messages.

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<b>Phone</b>	<p>Indicates the number at which the patient wants to be be contacted by phone or voice message</p> <p>[<i>seven-digit phone number</i>] = yes, contact at this number</p> <p><b>No</b> = no phone number is set up for this patient, or the patient does not want to be contacted by phone or voice message</p>
<b>Text</b>	<p>Indicates the number at which the patient wants to be be contacted by Short Message System (SMS)</p> <p>[<i>seven-digit phone number</i>] = yes, contact at this number</p> <p><b>No</b> = No SMS-enabled phone is set up for this patient, or the patient does not want to be contacted by SMS</p>
<b>Email</b>	<p>Indicates the email address at which the patient wants to be be contacted</p> <p>[<i>email address</i>] = yes, contact at this email address</p> <p><b>No</b> = no email address is set up for this patient, or the patient does not want to be contacted by email</p>
	<p>Select to display the Patient Contact Settings window, where you can define contact options for the patient.</p>
	<p>Select to return to the previous Will Call window.</p>
	<p>Select to display the next Will Call window.</p>

## Prescription Selection Window

In the Will Call process, the system displays the Prescription Selection window when you select a patient from the Patient Search window.

The following describes the fields on the Prescription Selection window.

### Show Messages

Select to display the Patient Messages window.

The system displays all messages for the patient that are set up to display at Will Call.

### Current Prescriptions

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<b>#</b>	Displays the prescription number
<b>Sell</b>	Indicates if the prescription is ready to be sold If the patient does not want to pick up the prescription, clear the <b>Sell</b> checkbox.
<b>Patient Name</b>	Name of the patient
<b>Interpreter Required</b>	Indicates whether this patient requires an interpreter <b>Yes</b> = patient requires interpreter <b>No</b> = patient does not require interpreter
<b>MRN</b>	Patient's medical record number
<b>Drug Name</b>	Name of the drug being dispensed
<b>Quantity</b>	Quantity of the drug being dispensed
<b>Fill</b>	Indicates if the prescription is a partial fill, the completion of a partial fill, or a complete fill <b>Blank</b> = complete fill <b>Partial Fill</b> = initial partial fill <b>Completion Fill</b> = partial fill completion
<b>Patient Pay</b>	Amount the patient or responsible party owes for the prescription
<b>AP</b>	Indicates by a checkmark that the amount the patient owes will be charged to their credit card via the AutoPay service.
<b>Counseling</b>	Indicates if pharmacist counseling is required to be offered to the patient, if pharmacist counseling has been completed, or if the patient accepted or refused counseling <b>Required</b> = pharmacist counseling is required to be offered <b>Accepted</b> = patient accepted counseling <b>Refused</b> = patient refused counseling If a dispensing rule determines that a prescription requires pharmacist counseling to be offered, the system sets this field to <b>Required</b> . On the Pharmacist Counseling window, when you add counseling notes and

select **Counseling Complete** or **Counseling Refused**, the system sets this drop-down list to **Accepted** or **Refused**.

<b>SC</b>	Indicates if the patient wants safety caps for the prescription <b>Yes</b> = patient wants safety caps <b>No</b> = patient does not want safety caps
<b>Status</b>	Current status of the prescription and, if the status is <b>Will Call</b> , the bin where the prescription is located Note: The prescription must be in <b>Will Call</b> for the system to enable the <b>Sell</b> checkbox.
<b>Confidential</b>	Teen confidential indicator <b>Y</b> = prescription is confidential. The prescription can be given to the patient only and cannot be mailed. Additionally, information about this prescription can be given only to the patient. <b>N</b> = prescription is not confidential

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<b>View Detail</b>	Select to view additional details for the selected prescription.
<b>Change Billing</b>	Select to change the billing information for the selected prescription. For more information, see <a href="#">Billing Change Overview</a> . If you select this button when a non-NCPDP partial fill is displayed, the system displays <b>Cannot change billing on a partial fill transaction</b> . <b>Select the completion fill to change billing.</b>
<b>Change AutoPay</b>	Select to display the Patient AutoPay window, where you can enroll the patient in the AutoPay service.
<b>Return to Data Entry</b>	Select to display the Will Call - Return to Data Entry window, where you can enter a reason the prescription needs to be returned to Data Entry. The system displays the prescription as a Data Entry Exception.
<b>Rx Profile</b>	Select to display the Order Entry Rx/Tx window, where you can view details for the order and check the status of orders the patient may have at other pharmacies throughout your chain.
<b>Pharmacist Counseling</b>	Select to display the Pharmacist Counseling window, where you can enter counseling notes for any prescription and offer pharmacist counseling for prescriptions that require it. Note: You can perform pharmacist counseling for any prescription.
<b>Patient Pay</b>	Total amount due from patient or responsible party Total of all amounts in <b>Patient Pay</b> for all prescriptions with <b>Sell</b> checked
<b>AutoPay (AP)</b>	Total amount that will be charged to the patient's credit card if the patient is enrolled in the AutoPay service
<b>Amount Due</b>	Net balance due from the patient Total of <b>Patient Pay</b> minus <b>AutoPay</b>

**Charge Credit Card on File**

Determines if the system submits a charge for the AutoPay amount using the patient's credit card

If the patient does not want to pay with a credit card, clear the **Charge Credit Card on File** checkbox.

Note: If the patient does not have a credit card on file, the system disables this checkbox.

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**Back**

Select to return to the previous Will Call window.

**Next**

Select to continue the Will Call process.

## Prescription Detail Window

To display the Prescription Detail window, select **View Detail** on the Prescription Selection window in Will Call. The entire window is display only.

The following describes the fields on the Prescription Detail window.

<b>Patient Name</b>	Patient's full name
<b>Location</b>	If the transaction is in Will Call, the system displays the Will Call bin and slot. If the transaction is <b>not</b> in Will Call, the system displays the Workflow state in which the transaction is located (for example, Will Call).
<b>Drug Name</b>	Name of the dispensed drug
<b>PickupType</b>	Indicates when or how the patient will receive the prescription <b>Waiting</b> = patient is waiting in the store <b>Shopping</b> = patient will pick up the order later, but will remain in the store shopping <b>Today</b> = patient will pick up the order some time today <b>Future Date</b> = patient will pick up the order some time after today <b>Mail to Patient</b> = prescription will be mailed to the patient
<b>Promised</b>	Promised date and time for the prescription
<b>Description</b>	Will Call bin description
<b>Contact When Ready</b>	Method to use to contact the patient when the order is ready <b>Phone</b> = contact the patient by telephone at the displayed number <b>SMS</b> = contact the patient by Short Message System (text message) <b>Email</b> = contact the patient by email at the displayed address

**Contact List** - Displays contact history for any call task associated with this transaction, sorted by date and time

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<b>Date</b>	Date and time of contact attempt
<b>Contact</b>	Name of contact
<b>Type</b>	Display method of contact attempt If the task was not a call prescriber task, the system displays the phone number. If the task was a prescriber task, the system displays one of the following: <b>F</b> = Fax <b>P</b> = Phone <b>E</b> = eScript <b>R</b> = Rescheduled <b>X</b> = ERx Fax
<b>Status</b>	Status of contact attempt

**Regular/Partial/Completion Fill** - Displays **Regular Fill** if the prescription is filled completely at the first fill. Displays **Partial Fill** if the information is for the partial fill of a prescription. Displays **Completion Fill** if the information is for the completion of a partially filled prescription.

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**Prescribed...** Quantity originally prescribed for the prescription

**This Fill Qty.** Quantity dispensed for this fill of the prescription

**Owed Qty** Quantity remaining to be dispensed for the prescription if it was partially filled

### **Billing**

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**Primary** Primary third party to which the claim will be billed

**Secondary** Secondary third party to which the claim will be billed

**Tertiary** Tertiary third party to which the claim will be billed

**Patient Pay** Amount the patient or responsible party owes for the prescription

### **Claim Transmit History** - Displays up to nine third party payers

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**Carrier ID** Third party carrier identification code

**Status** Indicates the payment status of the claim  
**Paid** = third party paid the claim in full  
**Part** = third party partially paid for the claim  
**Reject** = third party rejected the claim  
**Credit** = third party accepted a reversal for the claim  
**Low Pay** = difference between the amount you submitted for payment and the amount the third party paid was greater than the low pay amount defined on the insurance plan record

**Message** Message returned from the third party

**Reject Codes and Descriptions** If the third party rejected the claim, the system displays reject codes and their descriptions.

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Select to close the window.


## Patient Search Window

To display the Patient Search window, select **Will Call** from the Welcome window.

The following describes the fields on the Patient Search window.

### Local/Central Database Search

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<b>Region</b>	Region in which you want to search
<b>MRN Prefix</b>	Location ID for the MRN Note: For regions other than NCA (Northern California) and SCA (Southern California) this field is disabled.
<b>MRN</b>	Patient's medical record number
<b>Last Name</b>	Patient's last name
<b>First Name</b>	Patient's first name
<b>Address</b>	Street address for the patient
<b>Date of Birth</b>	Date patient was born
<b>7-digit Phone</b>	Patient's seven-digit phone number Note: You cannot enter a partial phone number in this field.
<b>Gender</b>	Patient's gender
<b>City</b>	City where the patient's address is located
<b>State</b>	State where the patient's address is located
<b>Zip Code</b>	Patient's ZIP code
	Select to search for the patient in the local or central database.

### Results List

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<b>Patient Name</b>	Patient's full name
<b>MRN</b>	Patient's local or home medical record number
<b>Street</b>	Patient's street address
<b>City, State ZIP</b>	City, state, and ZIP for the patient's address
<b>Phone Number</b>	Patient's phone number
<b>Date of Birth</b>	Date patient was born
<b>Multiple Birth</b>	Identifies if the patient was one of a multiple birth, such as a twin or triplet
<b>Type</b>	Indicates the type of patient record, such as patient, animal, or office



## Deactivated

Date the patient record was deactivated

**Select**

Highlight a patient record and choose **Select** to advance to the Prescription Selection window.

Note: If messages are set up to display for the patient at Will Call, the system displays the Notes and Messages window.

**Get More Results**

Select to display more patient records.

**Clear**

Select to clear the window.

## Select Patient by KP Rx or TX Number

### KP Rx

KP prescription number to use to search for a patient

Note: You can also enter the transaction number.

Scan the prescription or type the number and select **Enter**.

**Enter**

Select to search for a patient.

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