

Workstation Configuration Overview

The Workstation Configuration window lets you configure various settings for an individual workstation, edit printer, scanner, and signature capture device settings, and modify alternate site settings.

Each workstation must meet the following requirements.

- **Administrator Access** - system administrators must have a Windows login
- **Internet Access** - each workstation must have Internet access to pull updates down from the Rx.com Enterprise Command Center (ECC).

From the Workstation Configuration window, you can access the following windows.

- **Workflow** On this window, you can define which Workflow tasks the system displays at the workstation. Also, you can change the user authentication method for the workstation and define the parameters that identify the workstation. For more information, see [Workstation Configuration Workflow Window](#).
- **Printers**
On this window, you can view and modify the settings for the various printers in your store. For example, you can change the paper tray from upper to lower. For more information, see [Workstation Configuration Printers Window](#).
- **Scanners**
On this window, you can view and modify the settings for the scanners connected to each workstation in your store. For example, you can set a scanner to scan in color. For more information, see [Workstation Configuration Scanners Window](#).
- **Signature Capture**
On this window, you can view and modify the settings for the signature capture device attached to the workstation. For more

information, see [Workstation Configuration Signature Capture Window](#).

- **Alternate Site**

On this window you can define the settings that determines whether the workstation can process alternate site tasks. For more information, see [Workstation Configuration Alternate Site Window](#).

- **Authentication**

On this window, you can change the authentication method for the workstation to either the biometric device or user name and password. For more information, see [Workstation Configuration Authentication window](#).

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Alternate Site Retrieval Scope

The Alternate Site retrieval scope is a free-format path that your system administrator defines. You set up the retrieval scope based on which Alternate Site tasks you want to be able to process at a given workstation.

For example, you can create a retrieval scope for your chain using a high level chain ID, and narrow the scope based on regional and district designations. The retrieval scope would be constructed as follows: [chain ID].[region ID].[district ID].[store ID].

- Chain ID = ABC Pharmacy
- Region ID = 1 through 5
- District ID = 1 through 5
- Store ID = 1 through 50

If you only want stores in the same district to process Alternate Site tasks for one another, you would enter the retrieval scope path at each store as follows: **ABC Pharmacy.1.1**. For this example, the stores are located in region 1, district 1. For your stores located in region 1, district 2, you would enter the retrieval scope path at each store as follows: **ABC Pharmacy.1.2**. However, if you want all stores in region 1 to process Alternate Site tasks for one another, you would enter the retrieval scope path at each store as follows: **ABC Pharmacy.1**.

If you have a single chain-wide call center where you want to process Alternate Site tasks for all of your stores, you would enter the retrieval scope path at the call center as follows: **ABC Pharmacy**.

See Also

[Workstation Configuration Overview](#)

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Change Authentication Method

To change the authentication method from biometric to username and password:

1. Select **Tools > Workstation Configuration**.

The system displays the Workstation Configuration window.

2. Select the **Authentication** tab.
3. Set the **Authentication Method** option to **Username and Password**.
4. Select **Apply**.

See Also

[Workstation Configuration Overview](#)

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Defining a Workstation for Local/Remote Use

The workstation is the physical computer that accesses the data.

To define a workstation for local or remote operation:

1. Select **Tools > Workstation Configuration**, then select the Alternate Site tab.
2. Set **ECC Setting** to the configuration option you want.
 - **Local Only** = Get Next gets only local tasks
 - **Local, then Remote** = Get Next looks for and gets local tasks and then if it finds no local tasks it gets remote tasks
 - **Remote Only** = Get Next gets only remote tasks
 - **Remote, then Local** = Get Next looks for and gets remote tasks and then if it finds no remote tasks it gets local tasks
3. Select **Apply**.

Establish Scanner Settings

Use the Workstation Configuration Scanners window to establish scanner settings. Typically you establish these settings during new EPS installations.

Note: The Document Types listed are programmed into the system. You cannot change them.

To establish scanner settings:

1. Select **Tools > Workstation Configuration**.

The system displays the Workstation Configuration window.

2. Select the **Scanners** tab.

The grid at the top of the window lists scanner settings for each document type. Because you are establishing the scanner settings, it is empty.

3. Select the first row of the table and select **Edit**.

The system enables the fields in the **Edit Patient Information Scan Setting** area.

4. Set **Scanner Name** to the scanner you want.

5. Set the image **Magnification** to the size you want.

6. Slide the **Brightness**, **Contrast**, and **Resolution** bars to increase the readability of the image (if needed).

7. If you selected the **Document Type** of **Rx** in the grid at the top, select the **Duplex** checkbox.

8. Do one of the following:

- To test the settings before you save them, select **Test**.
- To save the settings, select **Save**.

- To return settings to their original values, select **Restore**.

See Also

[Workstation Configuration Scanners Window](#)

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Filter Fulfillment Tasks

Use the Workstation Configuration Workflow window to determine which workflow fulfillment tasks can be filled at the store, based on pickup type and fill location. Choices are: Mail Order, Central Fill, and Local. Typically you establish these settings during new EPS installations.

Note: You can choose some, all, or none of these tasks.

To select workflow fulfillment tasks:

1. Select **Tools > Workstation Configuration**.

The system displays the Workstation Configuration window.

2. Select the **Workflow** tab.
3. In the Fulfillment Tasks section, select the tasks that can be processed at the store: **Mail Order**, **Central Fill**, and/or **Local**.
4. Select **Apply** to save your settings.

See Also

[Workstation Configuration Overview](#)

[Workstation Configuration Workflow Window](#)

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Workstation Configuration Workflow Window

To access the Workstation Configuration Workflow window, select **Tools > Workstation Configuration** and select the **Workflow** tab.

The following describes the fields on the Workstation Configuration Workflow window.

Workstation Tasks

Auto Get Next	Determines if the system displays the next available task when you complete a task
Order Entry	Determines if you can perform Order Entry tasks at this workstation If you clear this checkbox, the system disables the Order Entry option on the Welcome window.
Patient Maintenance	Determines if the system displays Patient Maintenance tasks at this workstation
Data Entry	Determines if the system displays Data Entry tasks at this workstation
Data Entry Exception	Determines if the system displays Data Entry tasks that are in an exception state at this workstation
Fill Calls	Determines if the system displays Fill tasks at this workstation Determines if you are allowed to access the Open Call Queue window at this workstation If you clear this checkbox, the system disables the Open Call Queue (CTRL+O) option on the Tools > Task Queues menu.
Will Call	Determines if you can perform Will Call tasks at this workstation If you clear this checkbox, the system disables the Will Call option on the Welcome window.
Packing Station	Determines if you can perform Packing Station tasks at this workstation If you clear this checkbox, the system disables the Packing Station option on the Welcome window.
Data Verification	Determines if the system displays Data Verification tasks at this workstation
Data Verification 2	Determines if the system displays Data Verification 2 tasks at this workstation

Product Verification	<p>Determines if you can perform Product Verification tasks at this workstation</p> <p>If you clear this checkbox, the system disables the Product Verification option on the Welcome window.</p>
Medication Therapy Management	<p>Determines if you can perform Medication Therapy Management (MTM) tasks at this workstation</p> <p>If you clear this checkbox, the system disables the MTM option on the Welcome window.</p>
POS Payment Override	<p>Determines if you can perform Manager Payment Override tasks at this workstation</p> <p>Note: Only managers can perform Manager Payment Override tasks.</p>
Mail Order Approval	<p>Determines if you can perform Mail Order Approval tasks at this workstation</p>
All Third Party Exceptions	<p>Determines if the system selects or clears all Third Party Exceptions task checkboxes</p>
Third Party Exception Level 1	<p>Determines if the system displays level 1 Third Party exception tasks at this workstation</p> <p>Note: You define the level of third party exceptions on the Third Party Exception Routing window.</p>
Third Party Exception Level 2	<p>Determines if the system displays level 2 Third Party exception tasks at this workstation</p>
Third Party Exception Level 3	<p>Determines if the system displays level 3 Third Party exception tasks at this workstation</p>
Third Party Exception Level 4	<p>Determines if the system displays level 4 Third Party exception tasks at this workstation</p>
Third Party Exception Level 5	<p>Determines if the system displays level 5 Third Party exception tasks at this workstation</p>
Low Pay	<p>Determines if the system displays Third Party Low Pay tasks at this workstation</p> <p>The system creates a Third Party Low Pay task when you receive a response from a third party and the system determines that the amount the third party paid meets the low payment threshold. To qualify as a low payment, the 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.</p>

Coordination of Benefits Review	<p>Determines if the system displays Coordination of Benefits (CoB) Review tasks at this workstation</p> <p>The system creates a CoB Review task when you receive a response from a primary or secondary third party and you need to enter additional information in order to split bill the claim to the secondary or tertiary third party.</p> <p>Note: The Requires Split Bill Review checkbox on the Insurance Plan Billing window determines whether a plan requires you to enter additional information prior to submitting a split billed claim.</p>
Process Adjudication Result	<p>Determines if you can perform Process Adjudication Result tasks at this workstation</p> <p>The system creates this task when you receive a response from a third party for a submitted claim that was previously in downtime.</p>
All Error Handling	Determines if the system selects or clears all Error Handling task checkboxes
Error Handling	<p>Determines if the system displays Error Handling tasks at this workstation</p> <p>The system creates an Error Handling task when a background communication error occurs that causes a task to fail.</p>
Central Fill Error Handling	<p>Determines if the system displays Central Fill Error Handling tasks at this workstation</p> <p>The system creates a Central Fill Error Handling task when a background communication error occurs that causes a Central Fill transmission to fail.</p>
Escript Tasks	<p>Determines if the system displays new eScript tasks at this workstation</p> <p>The system creates a new eScript task when you receive a new prescription from a prescriber electronically.</p>

Workstation

HTTP Port	<p>Network communication port for this workstation</p> <p>Default = 58082</p>
Station Label	Name or label for this workstation
Display to Dashboard	<p>Determines how the system displays this workstation on the Dashboard</p> <p>Station Label = system displays the label entered in the Station Label field</p> <p>Computer Name = system displays the network host name of the</p>

workstation computer

Workflow Mode

Standard	Determines if the system omits on file and conversion prescription tasks from the workstation If you select this option, the workstation user cannot process on file or conversion prescriptions. Note: The system banner is blue when this option is selected.
On File - Only Process On File Prescriptions	Determines if the system displays on file prescription tasks at this workstation If you select this option, the workstation user can process only on file prescriptions. Note: The system banner is red when this option is selected.
RxConversion - Only process RxConversion Prescriptions	Determines if the system displays conversion prescription tasks at this workstation If you select this option, the workstation user can process only conversion prescriptions. Note: The system banner is green when this option is selected.

Fulfillment Tasks

Mail Order	Determines which prescription tasks are available for processing If you select this option, then only mail order prescription tasks can be accessed. Note: You can select more than one Fulfillment Task.
Central Fill	Determines which prescription tasks are available for processing If you select this option, then only central fill prescription tasks can be accessed.
Local	Determines which prescription tasks are available for processing If you select this option, then only local prescription tasks can be accessed.

Apply

Select to save any changes you made to the workstation configuration.


Workstation Configuration Printers Window

The Workstation Configuration Printers window lets you view and modify the settings for the printers attached to the workstation. To access the Workstation Configuration Printers window, select **Tools > Workstation Configuration** and select the **Printers** tab.

The following describes the fields on the Workstation Configuration Printers window.

Printers for this Workstation

Printer Type	Type of printer Backtag = a label that is placed on the back of the hard copy prescription before it is filed away Bottle = prescription label that is affixed to the bottle (if you use a thermal printer at Fill) Receipt = receipt that accompanies the prescription vial The receipt is attached to the outside of the prescription bag Label = prescription label that is affixed to the bottle (if you use a laser printer at Product Verification) Compound Recipe = Intervention Docs = the PDF printer driver for printing Pharmacist Intervention documents Patient Education = detailed printout of drug information Report = reports Matching Issue = third party Medicare eligibility matching issues that need to be resolved Barcode = image ID barcodes Signature Capture = signature block for pickup signatures Packing Station = local mail order receipts NDC Docs - Manufacturer Services documents such as Print on Demand materials and MedGuides
Printer Name / File Name	Name of the printer on your network
Paper Source	Paper source for the printer
Paper Size	Paper size for the printer
Top Indent	Number of inches to indent from the top edge of the page

Left Indent	Number of inches to indent from the left side of the page
Tray For Additional Pages	Name of the printer that prints any additional pages
	Select to edit the settings for the highlighted printer.
Send to Printer	Determines if the system sends the output to a physical printer when the selected printer is used
Save to File	Determines if the system sends the output to a file on the EPS server when the selected printer is used

Edit the Printer Settings - The system displays this section if you select the **Send to Printer** option.

Printer Name	Determines the printer to use for print jobs for this workstation The system displays all printers available to this workstation.
Top Indent (Inches)	Number of inches to indent from the top edge of the page
Left Indent (Inches)	Number of inches to indent from the left edge of the page
Render in PCL	Select to render labels in printer command language (PCL). If Catalina Health Resource is enabled on the Communication Settings window (Administration > Communication Settings), you must select this checkbox for CHR content to be printed. The system displays this checkbox when you select Label in the Printers for this Workstation list.
Paper Size	Determines the size of the paper (options vary depending on the printer)
Paper Source	Determines which tray is the default paper source for the printer for this workstation (options vary depending on the printer)
Paper Source For Additional Pages	Determines which tray is the default paper source for any additional pages

Edit the Save to File Settings - The system displays this section if you select the **Save to File** option.

File Path and Name on Server	Directory path and filename on the EPS server where the output is saved
Add unique file	Select to add a number to the end of the file name

extension If you select this option, the system creates a new report with a different file name each time save to this file.

Create using this Format File format in which the system creates the report
Options include: **ALL**, **CSV**, **HTML**, **JPG**, **LPT**, **PDF**, **PNG**, **PS**, **RTF**, **XHTML**, **XLS**, **XML**, and **PCL**.

Delimiter Options Options available for delimited output
Tab = select to create tab-delimited output
Semicolon = select to create semicolon-delimited output
Comma = select to create comma-delimited output
Space = select to create space-delimited output
Other = select to enter a character to use for the delimited output
If you select this option, the system enables the field to the right where you can enter the character

Save

Select to save changes to the displayed record.

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Workstation Configuration Scanners Window

The Workstation Configuration Signature Capture window lets you view and modify the settings for the scanner attached to the workstation. To access the Workstation Configuration Scanners Capture window, select **Tools > Workstation Configuration** and select the **Scanners** tab.


The following describes the fields on the Workstation Configuration Scanners window.

Scanner for this Workstation

#	Identifier for the scanner
Document Type	Type of document (Patient Information, Patient Signature, prescription, and so on) The system displays these document types - you cannot change them.
Scanner Name	Name for the scanner This column is blank for new EPS installations. For EPS upgrades, the system retains the existing scanner information.
Color	Indicates whether the scanner is set to print color or gray scale
Duplex	Indicates whether the scanner is set to produce one- or two-sided images Blank = one sided True = two sided (duplex)
Brightness	Number indicating the brightness of the scanned image A positive number indicates the image is lightened; a negative number indicates it is darkened.
Contrast	Number indicating the contrast level of the scanned image A positive number indicates the contrast level is increased; a negative number indicates it is reduced.
Resolution	Number indicating the image's resolution Range is 50 DPI to 300 DPI.
Magnification	Number indicating the level of magnification of the scanned image

<input type="button" value="Edit"/>	Select to enable the fields in the Edit Patient Information Scan Settings area.
<input type="button" value="Debug All"/>	Sets all the scanners to the Debug scanner You can use this setting to test the scanners to be sure they work correctly.
Disable Scanning	Enables or disables scanning for this workstation
<input type="button" value="Apply"/>	Select to save your change to the Disable Scanning checkbox.

Edit Patient Information Scan Settings

Scanner Name	The scanner you are connecting to this workstation
Color	Determines whether the scanner scans in gray scale or color
Magnification	Determines the magnification level of the image the scanner produces. Note: You can also use the Resize Image  icon to resize an image.
Brightness	Lightens or darkens the image The default setting is at the middle of the bar, indicating 0 (zero).
Contrast	Increases or decreases the image's contrast The default setting is at the middle of the bar, indicating 0 (zero). Use this setting to increase readability if the image is too light.
Resolution	Increases or decreases the image's resolution The higher the number, the sharper the image is. Range is 50 dpi to 300 dpi.
Duplex	Determines if the scanner produces an image of both sides of the prescription If you select this checkbox, you must scan both sides of the prescription.
<input type="button" value="Save"/>	Select to save your changes. When all changes are applied, the system displays Scanning Disabled, Scanner Available for [document type] , or Scanner Not Available on any window with scanning capabilities.
<input type="button" value="Test"/>	Select to open a window that enables you to generate a test image. The sample indicates the image's size.
<input type="button" value="Restore"/>	Select to restore the settings to their previous state before you

changed them.

Identify Barcodes Surrounds the barcode on the image with a red box. Click [= 4](#)
[&& typeof\(BSPSPopupOnMouseOver\) == 'function'\)
BSPSPopupOnMouseOver\(event\);" class="BSSCPopup"
onclick="BSSCPopup\('Sample_ID_barcode_image.htm'\);return
false;">here](#) for a sample.

See Also

[Establish Scanner Settings](#)

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Workstation Configuration Signature Capture Window

The Workstation Configuration Signature Capture window lets you view and modify the settings for the signature capture device attached to the workstation. To access the Workstation Configuration Signature Capture window, select **Tools > Workstation Configuration** and select the **Signature Capture** tab.

The following describes the fields on the Workstation Configuration Signature Capture window.

Signature Capture Device

Device Type Type of signature capture device attached to the workstation: **Ingenico eN-Touch 1000, Ingenico i6780, HHP , Hypercom, or VeriFone MX870.**

COM Port Communications port where the device is attached

Signature Capture Proxy - The fields in this section are defined on the Signature Capture window in Communication Settings.

Terminal ID Terminal ID (IP address) of the specific signature capture device for the workstation.

Note: The system enables this drop-down list if you set the **Device Type** option to **VeriFone MX870.**

Host Hostname of the signature capture proxy server

Port Network port of the signature capture proxy server


Path Directory path of the signature capture proxy server

Will Call Signature Capture Methods - The system determines which checkboxes to enable in this section based on the **Will Call Signature Capture Method** option on the Signature Capture window in Communication Settings. If you have two Will Call workstations—one at the front of the pharmacy and one at the drive through window—you can set the signature capture method on each workstation.

Manual Patient signs a hard copy document that you file in a designated place and you manually update the status of the signature to **ACQUIRED**

- Scanner** You print a signature block for the selected document, the patient signs it, and you scan the signed signature block
- Signature Capture Device** System sends the signature block to signature capture device, the patient signs on the capture pad, then the device sends a digitized image of signature to EPS
- POS** Patient signs a signature capture device connected to your point of sale system

Other Signature Capture Methods - The system determines which checkboxes to enable in this section based on the **Will Call Signature Capture Method** option on the Signature Capture window in Communication Settings.

- Manual** Patient signs a hard copy document that you file in a designated place and you manually update the status of the signature to **ACQUIRED**
- Scanner** You print a signature block for the selected document, the patient signs it, and you scan the signed signature block.
- Signature Capture Device** System sends the signature block to signature capture device, the patient signs on the capture pad, then the device sends digitized image of the signature to EPS
-  Select to save any changes you made to the workstation configuration.

Workstation Configuration Alternate Site Window

The Workstation Configuration Alternate Site window lets you view and modify the alternate site settings the workstation. To access the Workstation Configuration Alternate Site window, select **Tools > Workstation Configuration** and select the **Alternate Site** tab.

The following describes the fields on the Workstation Configuration Alternate Site window.

ECC Setting	<p>Determines whether the system displays Alternate Site tasks at this workstation</p> <p>Local Only = system does not display Alternate Site tasks at this workstation</p> <p>Local, then Remote = system checks for local tasks first, and if none exist, it displays Alternate Site tasks</p> <p>Remote Only = system displays only Alternate Site tasks at this workstation</p> <p>Remote, then Local = system checks for Alternate Site tasks first, and if none exist, it displays local tasks</p>
Retrieval Scope	<p>Path the system uses to determine which Alternate Site tasks to display at this workstation</p> <p>The system only displays tasks that originated from workstations on the network with a compatible retrieval scope. For more information, see the Alternate Site section in the ECC help file.</p>


Apply

Select to save any changes you made to the workstation configuration.

Workstation Configuration Authentication Window

The Workstation Configuration Authentication window lets you change the authentication method for the workstation to either the biometric device or user name and password. To access the Workstation Configuration Authentication window, select **Tools > Workstation Configuration** and select the **Authentication** tab.

The following describes the fields on the Workstation Configuration Authentication window.

Authentication Method	Determines the user authentication method for the workstation Biometric Authentication = you place your finger on the biometrics device for authentication Username and Password = you enter your user name and password for authentication
	Select to save any changes you made to the authentication method.