



# 340B SPLIT BILL OVERVIEW



CERVEY

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# DASHBOARD

The Dashboard is one of the most Important aspects of Cervey Split Bill software. On the dashboard, view files scheduled to upload as well as rolling 30-day 340b Savings, WAC losses, and Smart Split Savings.

Check the dashboard daily for any missing files. If you do notice a missing file, email [contactus@cervey.com](mailto:contactus@cervey.com) or call 888-376-7409.

Account:  Server: VP02 | [Logout](#) | [Home](#)

Orders | Import Data | Inventory | Reports | Compliance | Help

Dashboard

89

View Exceptions

\$3,187.29 savings 11/15/2022

\$0.00 Savings 11/15/2022

30 Days Savings \$15,164.89

Apply Dates

Start: 10/17/2022

End: 11/16/2022

Received	File Name	Total	Processed	Direct	Errors	Exceptions	Cleared	Ignored	Ineligible	Raw
11/16/2022 9:11:00 AM	ImportFile.txt	2,577	2,497	0	0	66	0	6	375	2,577
11/15/2022 9:10:01 AM	ImportFile.txt	2,268	2,195	2	0	63	0	3	325	2,268
11/8/2022 9:09:00 AM	ImportFile.txt	1,984	1,928	2	0	35	0	10	343	1,984
11/3/2022 9:05:00 AM	ImportFile.txt	2,268	2,171	2	0	72	0	14	269	2,268
10/31/2022 9:08:00 AM	ImportFile.txt	1,847	1,775	0	0	59	0	7	238	1,847
10/30/2022 9:04:00 AM	ImportFile.txt	2,402	2,298	0	0	64	0	28	472	2,402

800-710-9348



# FILE UPLOADS

When uploading a file, ask the following questions:

1. Are there any dates that seem to be missing?
2. Do all files have similar record counts?
3. Are some record counts extremely low or do some seem excessive?
4. Does anything look out of place?

It's important to note that our software relies on data uploads from your IT department. A file transfer may get interrupted from time to time, causing data to go missing. It is the 340b coordinator's responsibility to recognize any significant changes and deal with them accordingly to ensure compliance.

The screenshot displays the CERVEY software dashboard. At the top left is the CERVEY logo. On the right, there is an 'Account:' dropdown menu and a 'Server: VP02 | Logout | Home' link. Below this is a navigation bar with tabs for 'Orders', 'Import Data', 'Inventory', 'Reports', 'Compliance', and 'Help'. The main dashboard area features a 'Dashboard' header and several key metrics: a large number '89', a calendar icon, a green circular icon with a white 'Y', and a donut chart. Below these are buttons for 'View Exceptions', '\$3,187.29 savings 11/15/2022', '\$0.00 Savings 11/15/2022', and '30 Days Savings \$15,164.89'. A date range selector shows 'Start: 10/17/2022' and 'End: 11/16/2022'. A table below lists file upload records with columns: Received, File Name, Total, Processed, Direct, Errors, Exceptions, Cleared, Ignored, Ineligible, and Raw. A yellow arrow points to the first row of the table. At the bottom right, there is a red square icon with a white 'Z' and a contact number '800-710-9348'.

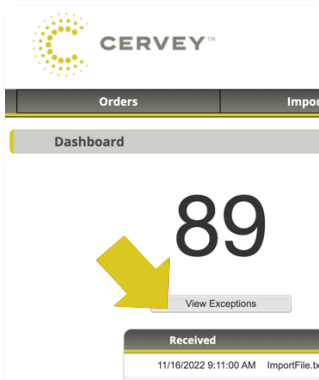
Received	File Name	Total	Processed	Direct	Errors	Exceptions	Cleared	Ignored	Ineligible	Raw
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11/8/2022 9:09:00 AM	ImportFile.txt	1,984	1,928	2	0	35	0	10	343	1,984
11/3/2022 9:05:00 AM	ImportFile.txt	2,268	2,171	2	0	72	0	14	269	2,268
10/31/2022 9:08:00 AM	ImportFile.txt	1,847	1,775	0	0	59	0	7	238	1,847
10/30/2022 9:04:00 AM	ImportFile.txt	2,402	2,298	0	0	64	0	28	472	2,402

# EXCEPTIONS

## What is an exception?

- Charge Code Users: If you are using charge codes, an *exception* can be defined as a charge code that has not been linked to an NDC number. This could be a new product that was just added to your hospital's dispensing or billing system.
- NDC Users: If you are uploading NDCs, an *exception* may be an NDC that is loaded as the unit dose NDC in your Hospital formulary instead of the package NDC. In this case, you must link the NDC to the package NDC. It could also be an old NDC that is discontinued, but it is still listed as your "default" or "current" NDC in your Hospital system. In this case you should **NEVER** link the NDC to a different NDC, so long as you determine you have not purchased the old NDC, and it's simply a mistake in your Hospital System. Clear the exception to the NDC being purchased and uncheck "link item." Then, inform your formulary person to change the default or current NDC in your Hospital system to prevent it from appearing in exceptions the next day.

**Why should you clear exceptions as soon as possible?** When an item is in the exception area, the accruals on that item will not be available for purchase until they are cleared. Check for exceptions on the dashboard DAILY, and clear out as soon as possible. Otherwise, you could be missing out on savings.



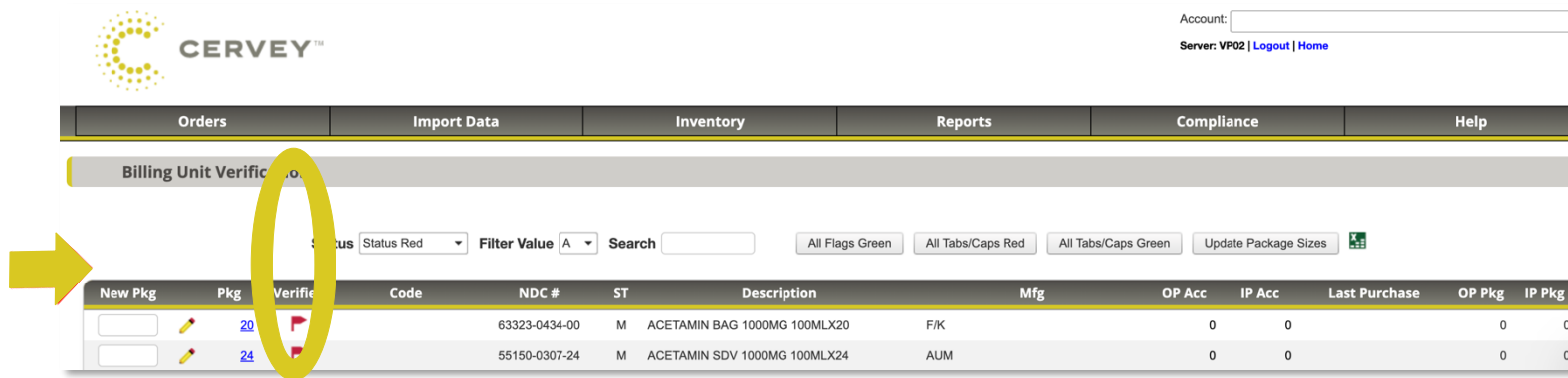
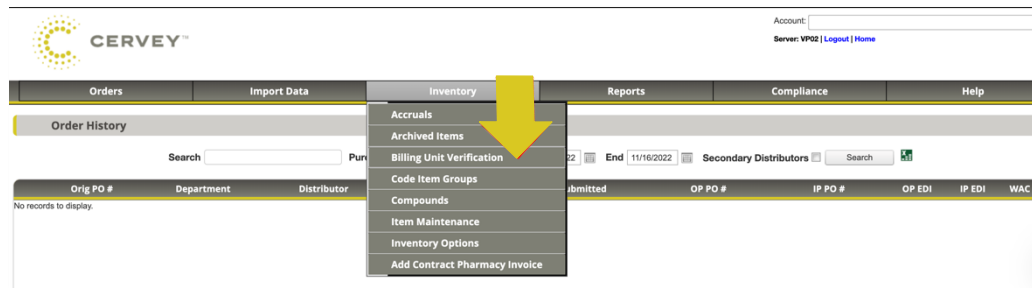
A screenshot of the CERVEY 'Exceptions' page. The top navigation bar includes 'Orders', 'Import Data', 'Inventory', 'Reports', 'Compliance', and 'Help'. The page title is 'Exceptions'. Below the title is a table with the following columns: Item #, Matched Item #, Description, Matched Description, OP Qty, IP Qty, First Import, and Last Import. The table contains five rows of data, each with a red 'N' icon in the first column. Below the table is a pagination bar showing 'Page size: 100' and '89 items in 1 pages'. At the bottom of the page, there is a form with fields for 'Upload Date', 'Generic', 'Status', 'Link Item', 'Value', 'Clear', 'Ignore Note', and 'Ignore'. A 'Rebuild Exceptions' button is also visible.

Item #	Matched Item #	Description	Matched Description	OP Qty	IP Qty	First Import	Last Import
N 118104	AA 4.25% w/ D10%W + Lyles IV Sol 2000 mL [RMCSC]			0.00	3.00	2022.04.29	2022.06.13
N 46725	amoxicillin-clav 600 mg-42.9 mg/5 mL Lq [RMCSC]			0.00	0.13	2021.09.03	2022.06.28
N 01312022	ampicillin-sulbactam 2 g-1 g Pow[RMCSC]			0.00	88.00	2022.02.19	2022.10.31
N 080120214	avibactam-ceftazidime 0.5 g-2 g Pow [RMCSC]			0.00	135.00	2021.11.06	2022.11.16
N 972021	baricitinib 2 mg Tab [RMCSC]			0.00	8.00	2021.09.18	2021.09.29

# BILLING UNIT VERIFICATION

Billing unit verification is used to verify the correct billing unit matches every NDC. If the billing unit is incorrect, it will cause either under or overinflated accruals. Incorrect accruals will result in too many purchases on one specific account (340b, GPO or WAC). Every individual NDC has its own billing unit. Initially, all billing unit flags are set to RED, which means they have not been verified. You can set all tabs/caps to Green since most tabs/caps are a one to one dispense. The billing unit will exactly match the number of tabs/caps in the package. As you verify each billing unit, change each flag to green by clicking on the flag. You may change a billing unit by entering a value in the box to the left of the item and clicking “update package sizes.” This will turn the flag green. The user can enter multiple billing units and click the “update package sizes” button to update multiple items on the screen at once.

After all flags are set to green, check the billing unit verification screen daily and set the status drop down to “All Red A-Z.” This will show the user any new items added where the billing unit has not been verified. This can also be accessed on the “Accruals” page under “Inventory.”



## BILLING UNIT VERIFICATION CONTINUED

### **What does the pack size column on the accrual page represent?**

The pack size represents the equivalent number of dispensed doses in one whole package that can be purchased from the wholesaler.

Example: One tab may be a dispensed dose, but if the whole bottle is made up of 100 tabs, then the package size would be 100.

Ask yourself this question: How many doses will it take to dispense an entire package? In the example above, the answer is 100. This is the package size.

If you have a product where the package size is listed in ML, but you dispense by teaspoons, ask yourself: How many teaspoons does it take to dispense an entire bottle? The answer to this question MUST be reflected on the package, even if your wholesaler may default the pack size to a different number.

### **Why is it so important that the pack sizes be reviewed and changed to equal your billing unit?**

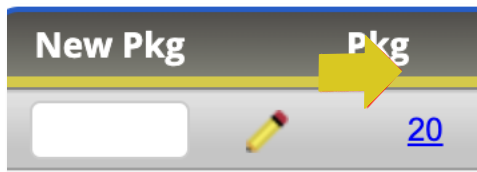
Failing to maintain your pack sizes can result in incorrect accruals.

Example: You bill a product by 1ml. For every dose dispensed it represents 1ml. There is 30ml in this product. After dispensing 30 doses (or 30ml), the hospital can purchase 1 whole package. In this case the package size should be set to 30. If it is set to 1, and not 30, the program will interpret 1 dose as 1 package and incorrectly allow you to order a package every time you dispense only one dose. This will cause you to purchase more of this product on either 340b or GPO and is non-compliant.

# BILLING UNIT VERIFICATION CONTINUED

**When to use the Package Size Wizard:** If purchases were made either on the GPO or 340b account with either the incorrect package size or billing unit, then you must use the Package Size Wizard to change the package size. This will change the amount deducted from an invoice based on the new package size. If there were no purchases made either on GPO or 340b, then you can change the package size via the “Edit Drug Screen”.

You should always keep in mind the date you change the package size. If your hospital has recently changed EHR systems which adjusted many of your package sizes, the dates should reflect the day the new system went live to change the package size. Going back too far will cause excessive negative accruals. Please check with your support person on the date you should enter when using the Package Size Wizard.



Package Size Wizard

Editing Item: 63323-0434-00 ACETAMIN BAG 1000MG 100MLX20

Code	Current Unit Factor	Unit Factor	Value	Applied Unit Factor
No records to display.				

Changes apply based on the selected filters below.

**Note:**

Package Size: 20  
 Test Package Size:    
 Test Package Size:

Current Out Patient Quantity: 0.0000  
 Current In Patient Quantity: 0.0000  
 Adjusted Out Patient Quantity:  
 Adjusted In Patient Quantity:  
 Total Rows Adjusted: 0

Type: Show All Start: 3/21/2022 Thru: 11/9/2022

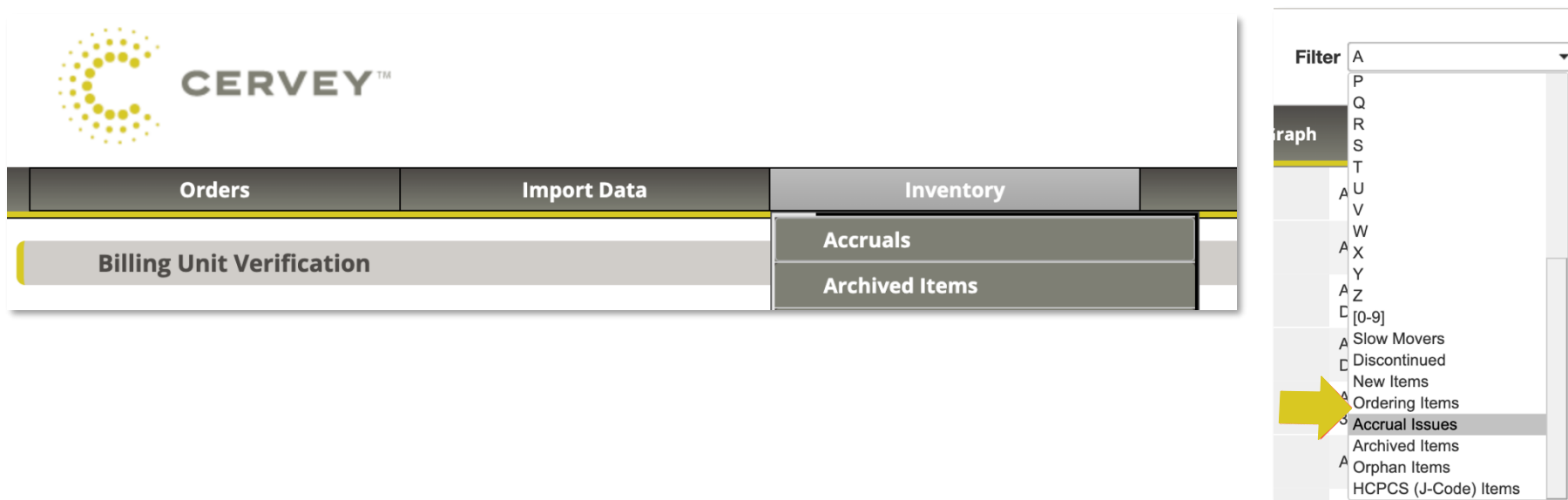
Transaction	Service	Accrual Type	Original Item	NDC #	Description	Client ID	Accrual Pkg
11/07/2022	Nov 7 2022 11:07PM	In Patient Invoice	63323043400	63323-0434-00	ACETAMINOPHEN IP10MG/ML 20X100 SD	17246696567	20
06/23/2022	Jun 23 2022 11:12PM	Out Patient Invoice	63323043400	63323-0434-00	ACETAMINOPHEN IP10MG/ML 20X100 SD	17214978839	20
04/27/2022	Apr 27 2022 11:41PM	In Patient Invoice	63323043400	63323-0434-00	ACETAMINOPHEN IP10MG/ML 20X100 SD	17201780439	20
04/08/2022	Apr 8 2022 6:05PM	In Patient Invoice	63323043400	63323-0434-00	ACETAMINOPHEN IP10MG/ML 20X100 SD	17197525343	20
03/21/2022	Mar 21 2022 11:18PM	In Patient Invoice	63323043400	63323-0434-00	ACETAMINOPHEN IP10MG/ML 20X100 SD	17193185421	20

# ACCRUALS

**Why are accruals SO IMPORTANT?** When a product is dispensed on any patient, this dose becomes available to repurchase either on Inpatient or Outpatient. However, since most products are not purchased one dose at a time, the dose will be added to previous doses that met the same criteria until the sum of doses reaches a full package. When the accrual reaches a package, our software will allow you to order the full package on the appropriate account. Also included in the accrual total will be any purchases, which will show up as deductions to the running total.

**\*\*TIP:** Accruals are the most important part of the 340b software. If your accruals are well maintained, you will maximize your savings.

You should regularly check the “Accrual Issues” filter found on the accruals screen. Click on the down arrow on the “Filter” box and choose “Accrual Issues”. This will show any item with a negative accrual, as well as any items with a large positive accrual. Since it’s rare that an item has a negative accrual, you should always investigate the reason behind the negative accrual. Ask yourself: Was the item credited back to a patient and came in as a credit on the file upload (note: a patient credit could create a VALID negative accrual)? Was the package size changed after purchases were made? There are several things that could cause a negative accrual.



The screenshot displays the CERVEY software interface. At the top left is the CERVEY logo. Below it is a navigation bar with buttons for "Orders", "Import Data", and "Inventory". Under "Inventory", there are buttons for "Accruals" and "Archived Items". A "Billing Unit Verification" button is also visible. On the right side, a "Filter" dropdown menu is open, showing a list of filter options. A yellow arrow points to the "Accrual Issues" option in the list.

Filter
A
P
Q
R
S
T
U
V
W
X
Y
Z
[0-9]
Slow Movers
Discontinued
New Items
Ordering Items
<b>Accrual Issues</b>
Archived Items
Orphan Items
HCPSC (J-Code) Items

# ACCRUALS CONTINUED

High positive accruals should also be addressed. Is the package size set correctly? Ask yourself this question: Have I purchased that many doses in a certain time period? Example: You only purchase a 240ml bottle 4 times a month. However, package size is set to 1, so the software says you can purchase 960 bottles. In this case, it would be obvious you are dispensing this product in mls and the package size needs to be changed to 240.

Some solutions will have extremely high accruals that are accurate. In this case, you can “Edit this Drug” and put in a reasonable value in the “Issue High Limit” field on the “Edit Drug Screen” to avoid having these items listed as “Accrual Issues.”

The image shows two screenshots from the CERVEY software interface. The left screenshot is the 'Billing Unit Verification' screen, which has a table with columns: 'New Pkg', 'Pkg', 'Verified', and 'Code'. A yellow arrow points to the 'Pkg' column, which contains the value '20' and a red flag icon. The right screenshot is the 'Item Information' screen, which displays various fields for a drug item. A yellow arrow points from the 'Pkg' field in the left screenshot to the 'Package Size' field in the right screenshot. The 'Package Size' field is currently set to '1'. Other fields include 'Current Status: Mixed', 'OP Quantity: 0.0000', 'IP Quantity: -10.0000', 'Form Override: [checkbox]', 'BUV: [red flag]', 'Package Size Note: [text box]', 'Default Multiplier: 1.0000', 'OP On Order: 0', 'IP On Order: 0', 'OP Cost: N/A', 'IP Cost: N/A', 'WAC Cost: N/A', 'Ignore Purchases: [checkbox]', 'Audit Item: [checked]', 'Exact Match on Alts: [checkbox]', 'Issue Low Limit: 0', and 'Issue High Limit: 0'. There are also sections for 'Import Codes' and 'Item Numbers' which both show 'No records to display'.

## ACCRUALS CONTINUED

**Note:** If you purchase products for any clinic or facility whereby the accruals are not being uploaded to the software, you must inform either Cervey support, or your salesperson. Assuming this facility or clinic area are not drawing their inventory from the inpatient inventory, then it is recommended these areas do not flow through the software. In these cases, contact Cervey tech support. A special ordering department or PO number must be used to order for departments that are not included in file uploads. As such, the purchase data will not be imported in the software's accrual database. Please note: you should ensure that dispense activity from these areas is not included in the data upload from your IT Department by performing audits on these areas.

**A good rule of thumb to follow is this:** If the product was dispensed from a facility or clinic in which the product was pre-purchased directly on either a 340b or GPO account, then...

1. These accruals should NOT be included in the file upload and
2. The products should be purchased under a different ordering department or a special PO number on your wholesaler's ordering system.

You should always discuss any NEW facility or clinic with Cervey tech support BEFORE you begin to purchase in order to determine where those dispensed records should belong.

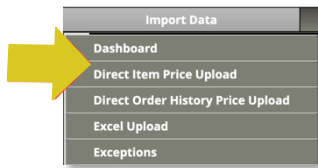
## IGNORED ITEMS

An ignored item is an item that is prevented from splitting to either the GPO or 340b accounts. When you ignore an item, the item will only be ordered on the WAC account. Why would I ignore an item? Here are a few reasons...

- 1) HRSA has what is called a GPO exclusion rule, which prevents a 340b covered entity from purchasing covered outpatient drugs through a GPO. Therefore, all covered outpatient drugs are purchased by using both an IP and OP accrual system. These items should **never be ignored**. However, if your hospital has an individual contract on a product, these items may be ignored because they do not interfere with the GPO exclusion rule.
- 2) Supplies may be on an Apexus contract and may be less expensive on the WAC account. You may ignore a supply and order it only on the WAC account.
- 3) Some direct MFG's will not have a GPO price or a 340b price. They simply have one price they sell to you. These products can also be ignored, but you must be careful you are not purchasing these items at GPO or 340b before you ignore them.

# IGNORED ITEMS CONTINUED

You can ignore an item either on the “Accruals” or the “Exceptions” pages. If you ignore an item from the exceptions page, then your items will be added to the ignored exceptions list. You have the ability to unignore the item at any time from that page. If you are ignoring an item, it will always be sent to the default account (WAC, GPO).



CERVEY™ Account: [ ] Server: VP02 | Logout | Home

Orders | Import Data | Inventory | Reports | Compliance | Help

Exceptions

Item #	Matched Item #	Description	Matched Description	OP Qty	IP Qty	First Import	Last Import
N 118104		AA 4.25% w/ D10%W + Lyles IV Sol 2000 mL [RMCSC]		0.00	3.00	2022.04.29	2022.08.13
N 46725		amoxicillin-clav 600 mg-42.9 mg/5 mL Liq [RMCSC]		0.00	0.13	2021.09.03	2022.06.28
N 01312022		ampicillin-sulbactam 2 g-1 g Pow[RMCSC]		0.00	88.00	2022.02.19	2022.10.31
N 06262021		bictegravir/emtricitabine/tenofovir 50 mg-200 mg-25 mg Tab [RMCSC]		3.00	12.00	2021.09.03	2021.09.03
N 25780		bupivacaine 0.25% - EPINEPHrine 1:200,000 Inj 50mL [RMCSC]		52.00	67.00	2021.09.03	2022.10.31

Page size: 100 87 Items

Upload Date: 03/11/2021 XXXXXX[Demo Item Description][PAT-ID]20210310 23:59:10[1.00][LOC]999999999[333333]O

bictegravir/emtricitabine/tenofovir [Search] Generic Status Mixed [Link Item] None Value [Clear] Ignore Note [Ignore]



Start 9/17/2022 End 11/16/2022 Search [ ] View [ ]

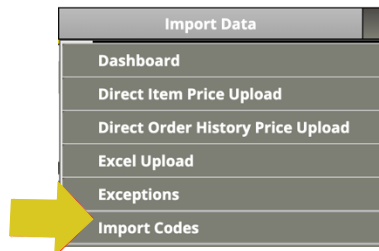
Item #	Description	Ignored	Last Upload	Accrual	Note
080120214	avibactam-ceftazidime 0.5 g-2 g Pow [RMCSC]	11/16/2022	11/16/2022	135.0000	
972021	baricitinib 2 mg Tab [RMCSC]	11/16/2022	09/29/2021	8.0000	
06262021	bictegravir/emtricitabine/tenofovir 50 mg-200 mg-2	11/16/2022	09/07/2021	15.0000	
03302014	midazolam 5 mg/1mL preservative-free Inj [RMCSC]	10/04/2022	11/16/2022	262.5000	supply item not part of 340B

# CHARGE CODES

Cervey's software has a new feature that will move your charge code based on your purchase history, also referred to as *auto mapping*. You will need to monitor this periodically to ensure accruals are accruing to the items purchased. To do this, check the accruals page to see if the charge code on the left of the screen is mapped to recently purchased product. If you are on "Auto Mapping" and you think the charge codes are not mapping correctly, contact your support person.

If you are not using "Auto Mapping" and choose to map manually, then you must ensure your charge code is mapped to the correct NDC. If not, the wrong NDC will accrue and the NDC you are purchasing will always purchase at WAC. Therefore, it is very important to have your codes mapped correctly. In our software, there are several ways to map a code:

- 1) Click on "Import Data." Then select "Import Codes." From there, navigate to the drop down and click "Description." Then click the Search Box. You will see all your items, and which NDC they are Mapped to. You will also see your last purchase dates on the right. If you have no last purchase dates on the item, you could be purchasing a different item.



A screenshot of the 'Import Codes' search interface. The 'Display' dropdown is set to 'Description'. A search box is visible. Below the search area is a table with the following data:

Code	Item #	NDC #	Description	Unit Factor	Orphan Code	Pkg	Manufacturer	Last Purch OP (IP) [NC]
0000949202	5103049	00009-4992-02	ZYVOX IV BAG 800MG/300ML/10 N+			10	PFZ	(7/19)
N26999	3569316	00002-7597-01	ZYPREXA VL 10 MG			1	LIL	6/19 (10/19)

Yellow arrows point to the 'Import Codes' tab, the 'Description' dropdown, the search box, and the 'Last Purch OP (IP) [NC]' column.

## CHARGE CODES CONTINUED

- 2) To re-map the code to a new NDC, click on the pill icon. The next screen will show you alternates and last purchase info. To switch the code, click the check box next to the code (or codes) in the upper half of the screen and highlight the item you wish to switch to in the lower half. At the bottom, type a detailed note. Then check "Confirm Selection." Lastly, click "Change Drug."

Change Drug

Switching From

NDC #: 00009-4992-02 Descr: ZYVOX IV BAG 600MG/300ML/10 N+ Mfg: PFZ OP Qty: 50.0000 IP Qty: 0.0000

Cost: \$204.620 IP CT: OP Cost: \$0.000 OP CT: WAC Cost: \$0.000 WAC CT:

Uploaded Items

NDC #	Item #	First Date	Last Date
<input checked="" type="checkbox"/>	00009-4992-02	00009499202	09/29/2019 01/23/2020

Change to Item

Search by Description or Generic Name

Search OR Show Generic Equiv.

NDC #	Description	Manufacturer	Last Purch (IP) [WAC]	Cost OP (IP) [WAC]	CT OP (IP) [WAC]	Qty OH
66794-0219-43	LINEZOLID IVSL 10X300ML	PIR		239.25 (302.11) [302.11]		0
66794-0219-43	LINEZOLID IVSL 10X300ML	PIR				0
67457-0843-30	LINEZOLID IVSL 10X300ML	MYI		238.67 (642.17) [233.60]		0
57664-0683-57	LINEZOLID IVSL 10X300ML	C-P		166.49 (215.07) [176.82]		0
25021-0169-97	LINEZOLID IVSL 10X300ML	S/P		272.93 (427.00) [232.29]		0
63323-0713-13	LINEZOLID600MG/300ML IVSL 10X300ML	F/K		84.45 (358.55) [358.55]		0
55150-0242-51	LINEZOLID600MG/300ML IVSL 10X300ML	AUM		497.65 (572.01) [572.01]		0
00781-3433-95	LINEZOLID600MG/300ML IVSL 10X300ML	SNZ		249.60 (266.61) [266.61]		0

By checking this box I understand that the existing accrual for the current drug will be converted to the new selection.

Comment: Detailed Note

Current IP Qty: 50.0000 Current IP Qty: 0.0000

IP Qty to Move: 0  Confirm Selection

Change Drug Close

- 3) From the accruals page, you can click the pill icon or green plus sign which allows you to change the code to point somewhere else.

page, you can click the pill icon

\*\* Note: Even though the "Change Drug Code" screen has the option of moving accruals, moving accruals from one NDC to another could cause you to be non-compliant, and should only be done under very specific circumstances. It is strongly suggested that you check with your 340b support person before moving any accruals.

# COMPOUNDS

Compounds can be used when you have one charge code which contains multiple ingredients. A good example would be a piggy back, where you use one vial which is attached to a bag. Click on "Compounds" under "Inventory," and add the compound by supplying a name for the compound. Add the charge code in the code box. Then search and add the ingredients. You can expand compound details by clicking the magnifying glass on the "Compounds" page.

The screenshot shows the CERVEY application interface. On the left is a navigation menu with 'Inventory' selected, and 'Compounds' highlighted with a yellow arrow. The main content area shows the 'Inventory' tab active, with a search bar containing 'Test Compound 2' and an 'Add' button. Below is a table of existing compounds.

Description	Added
GI Cocktail	6/17/2021
GI Cocktail 2	8/18/2021
MYLANTA-BENADRYL-LIDOCAINE SUSP	1/5/2020
TEST Compound	6/7/2021

This screenshot shows the 'Compound Details for: Test Compound 2' page. A search bar contains the word 'test', which is circled in yellow. A yellow arrow points to the 'Search Inventory' button. Below the search bar is a table listing search results.

NDC #	Description	Last Purchase	Mfg	Pkg Size
12345-1234-12	Test Item		Test	100
01234-5678-91	Test Item	6/22	Baxter	100
12345-6789-12	Test Meds	10/22 (7/22)	FFF	25
00409-6562-01	TESTOSTRNE CYPIONATE 200MG 1ML		PFZ	1
00143-9659-01	TESTOSTRNE CYPIONATE 200MG 1ML		W-W	1

This screenshot shows the 'Compound Details for: Test Compound 2' page with item details and a code selection window. The 'Test Item' section includes fields for NDC #, Mfg, Pkg Size, Multiplier, and Value. Below is a window for selecting a code.

**Test Item**

NDC # 12345-1234-12

Mfg Test

Pkg Size 100

Multiplier Multiplier

Value

Buttons: Add Item to Compound, Cancel

**Code Selection Window:**

Code	Added
333333	11/11

# DIRECT ORDERS

Items purchased directly from the MFG (not drop shipped through your wholesaler) offer either a GPO price, or a 340b price, and need to be marked as direct, and ordered on the correct direct account (GPO, 340b or WAC). Our software keeps track of you direct order accruals. When you are ready to order, click on “Direct Orders.” Build a PO based on the IP and OP accruals you have available. Submit and print the PO, and then call the MFG and order from the direct MFG on the correct account. Once you have received the merchandise, click on “Receive Direct Orders” to receive the PO. You will also have an option to change QTY’s if necessary.

Orders Import

- Order
- Order History
- Receive Direct Orders
- Departments
- Direct Order ←
- EDI History
- ContractPharmacy Orders

Direct Order

Add Item Merge Items Vendor Filter abc PO # Order Date 11/16/2022 Submit Order Refresh

Note

NDC #	Item Description	Vendor	Pkg	OP Acc	IP Acc	OP Cost	IP Cost	WAC Cost	OP LP	IP LP	OP Ord	IP Ord	Added	Tot Ord	SOP Ord	SIP Ord
00245-0147-60	PACERONE TAB 200 MG 60	abc	60	0.00	0.00	\$0.000	\$0.000	\$0.000	06/06/22		0	0	09/17/21	0	0	0

Orders Import

- Order
- Order History
- Receive Direct Orders ←
- Departments
- Direct Order
- EDI History
- ContractPharmacy Orders

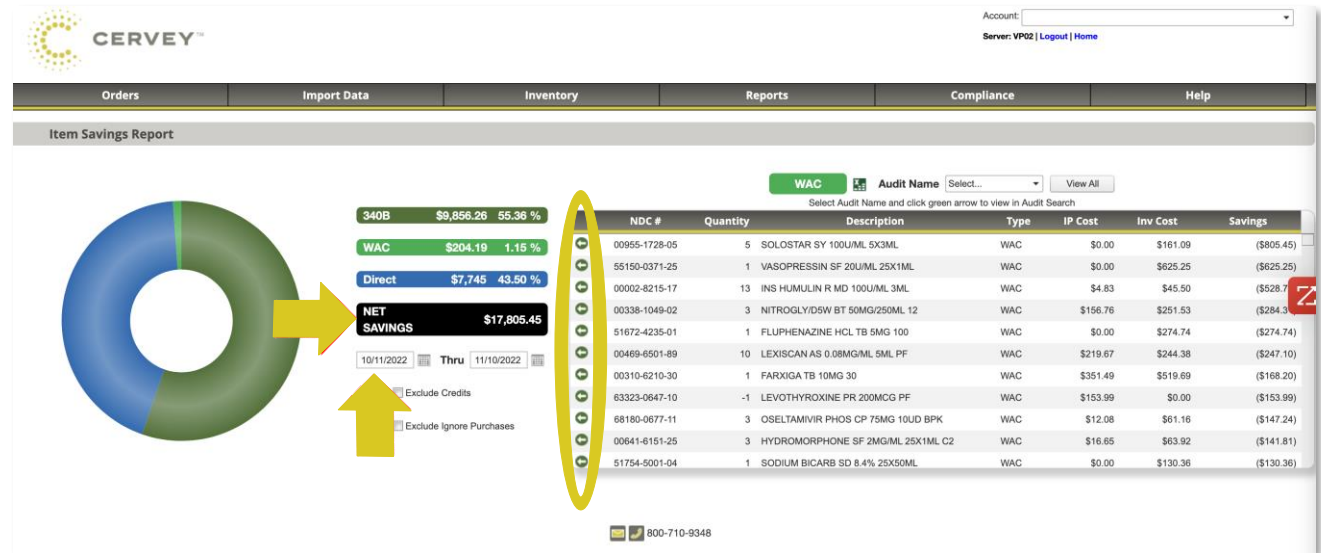
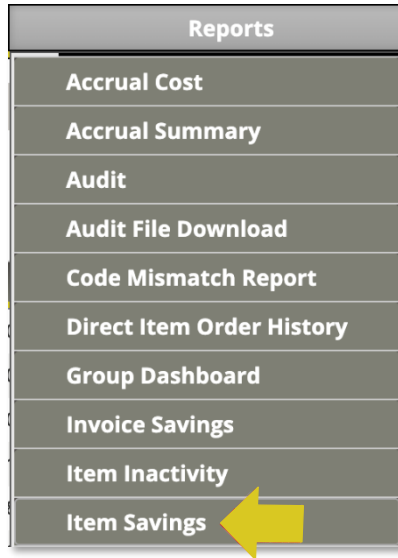
Receive Direct Order

Status All Vendor abc Start 10/17/2022 End 11/16/2022 Receive Date 11/16/2022 View

800-710-9348

# ITEMS SAVINGS

At the top half of the screen, key in the time period and click “Net Savings”. This report will show your savings and losses. The report is in descending order. Your biggest savings will be at the top and your biggest losses will be at the end of the report. Analyze your losses for potential solutions. Check these items for package size issues. If you cannot determine the reason for your loss, call or email our support team.

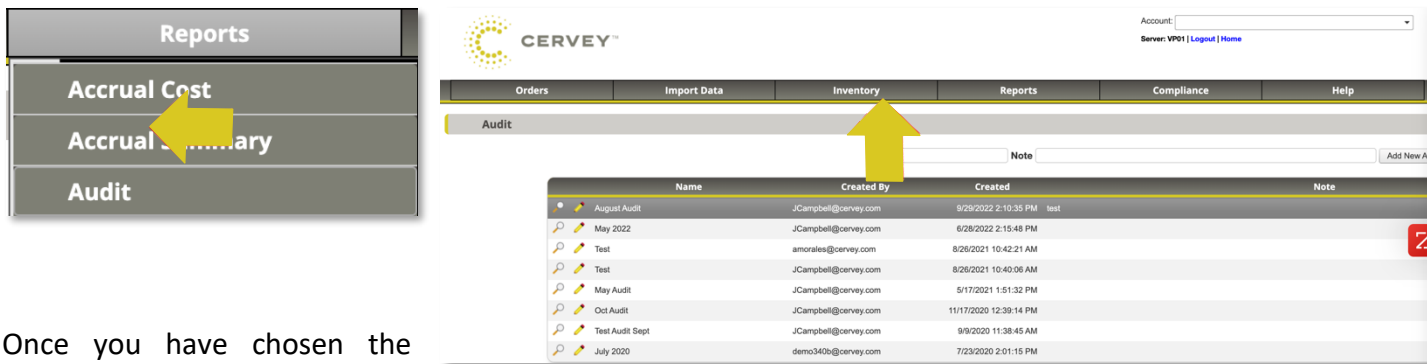


To the left of the items are green arrows.

You can choose an audit from the top of the drop-down menu, and it will automatically bring in the date range, along with all the data around the NDC upon clicking the green arrow.

# SELF-AUDITS

HRSA recommends an entity performs self-audits on a regular basis. To perform a self-audit, click the “Audit” tab under “Reports.” Name your audit (example: Dec 2018). Once you have built the audit, ensure it is highlighted. Then, navigate to “Audit Search” from the menu. From “Audit Search,” you can select items to include in your audit. Recommendations include high dollar, high quantity dispense, and high WAC, 340b or GPO purchases. In the search field, enter the NDCs. Select either outpatient or inpatient. Then select accruals. Remember to set your dates to coincide with the date of your audit. Select the records to include by clicking on the box to the left of the item once the data populates.



Once you have chosen the back to the “Audit” menu your selected audit. If you click the pencil to the left of each item, you can add a note to document your audit process. HRSA recommends the following check list when auditing.

records to include in your audit, go option. Your records will appear in

- The location of the service was eligible and listed in the HRSA 340b database
- The patient had outpatient status at the time of the 340b drugs administration or dispensing
- The entity has a valid record of patient care related to the prescription
- The provider was employed or contracted at the time the prescription or order was issued
- The Payor was eligible, if carving out Medicaid verify any Outpatient dispense was not Medicaid

# To Do List:

## Daily:

- Check dashboard that daily files have transmitted
- Clear exceptions
- Accruals – filter to new items
  - Code Groups – does this need to be a manual add to a code item group because the Gen Equivalent may be different than the items in the group (example: Amp vs Vial)

## Weekly

- Item Savings Report – Check WAC purchases
  - Is this a first-time purchase?
  - If using a charge code, is it attached to the last item purchased?
  - Is the item accruing?
  - Is the package size set correctly?
- Accruals – Filter to accrual issues
  - If negative, was the item purchased on the incorrect account without going through the splitter?
  - If negative, is this a supply and marked IP only, but ignored purchases have not been checked?
  - If too high, is package size correct? If so, has a high limit been set?
- Billing Unit Verification
  - Check all status red A-Z and correct or approve

## Monthly

- Self-Audits
  - Include area's that are excluded from the accrual data and manually add a record verifying it did not come over
  - Include random selections by clicking the "Random" button

# PRESCRIBER UPLOAD

For Covered Entities utilizing Prescriber Filtering for 340B eligibility, there is a “Prescriber Upload” page under the “Import Data” tab. This allows users to upload a full prescriber file at once. The page has a clickable set of instructions, which are listed below, as well as a sample file to use when creating the upload.

## Instructions for Prescriber Uploading

The Prescriber Inclusion Upload allows you to upload an Excel document saved as a **97-2003 Excel .xls document** and have the data replace your existing prescriber list.

Create an Excel document (97-2003 .xls). The upload supports the inclusion of four data values:

- a) Prescriber Name
- b) Prescriber Number (NPI)
- c) Prescriber Eligibility Start Date
- d) Prescriber Eligibility End Date

Empty rows will be ignored.

Do not include apostrophes or quote marks.

Do not include a header row for any column.

Do not modify the format settings of the date columns in any way.

Eligibility dates are optional (see example for what can be included or excluded).

[Click to download sample Prescriber Inclusion file](#)

You can save this file and populate it with your data if desired.