340B SPLITNAV
EXCEPTIONS

CERVEY®

Exceptions

This guide outlines the process for identifying and clearing exceptions within the Cervey SplitNAV software to ensure accurate accumulations and maximize 340B savings. Regularly addressing exceptions helps prevent missed opportunities and supports program compliance.

Definitions

<u>Exception</u>: An item number within the covered entity usage file that the software does not recognize. The item number (NDC users) is not in the item catalog or is not in the crosswalk file (CDM users) for matching to the appropriate NDC.

<u>Clearing an Exception</u>: Removing an exception off the list by moving accumulations to the proper NDC, adding it as a direct item or ignoring it.

<u>Item Catalog</u>: Typically referring to primary wholesalers' item catalog but can include secondary wholesaler or other vendors in which items are purchased directly via EDI.

<u>Direct Items</u>: Items purchased directly through a secondary vendor that are billed directly to covered entity (not billed through wholesaler) and EDI is not set-up within the software for that vendor.

Why Should you Clear Exceptions?

It's a savings issue! When an item is in the exception area, the accruals on that item will not be available for purchase until it is linked to the NDC being purchased and used. It is recommended to check for any new exceptions on the dashboard daily, but at minimum weekly. Any unlinked exception will cause the covered entity to miss out on potential 340B savings for that item.

Contents

How to Clear an Exception for an Item within the Item Catalog

1. From the *SplitNav* dashboard, click on the 'View Exceptions' button at the top left of the screen (see screenshot below).

2. Highlight the item to be cleared and software will automatically search item catalog for a matching description and list possible matches on the bottom half of the screen (see screenshot below).

Notes:

- User can sort by 'OP Qty' or 'IP Qty' if they want to attack exceptions with most quantity available first to maximize effort in recovering savings.
- Sample record is shown in middle of screen that can be used for seeing a dispense quantity or getting information for looking up in EMR system on a dispense.
- Status or unit factors can be changed or added to the item straight from this screen – located right above bottom section (or you can save it for later).
- When clicking on item description at bottom of screen, 'Generic' button can be used to list both brand and generic of item.

3. If the correct match does not appear in list, use search text to find by NDC, wholesaler item # or description used by primary vendor.
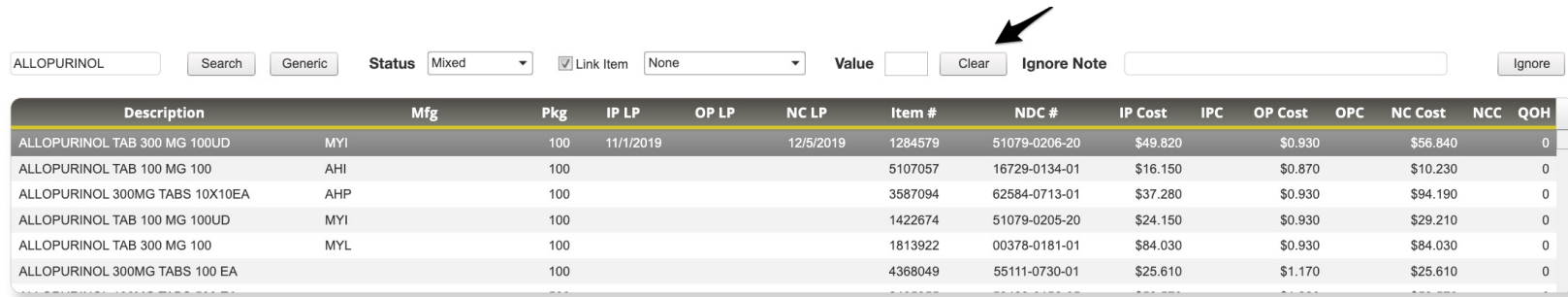
    a. Charge Code vs. NDC
    ==Charge code==: Charge codes that come across as an exception must be linked to the NDC currently being purchased/used that represents that charge code. In this case, the 'Link Item' box should remain checked (default). This will add the charge code to the crosswalk and prevent the user from getting the same exception next time that number comes across.

    ==NDC==: NDC's that come across as an exception are most-likely one of three things: (1) an inner-NDC that needs to be linked to the package NDC of the vendor, (2) a user created 'fake' NDC that represents a compound or piggy-back, or (3) an invalid NDC that is either discontinued or not in the catalog of a new vendor. In the first two scenarios, the 'Link Item' box should remain checked (default). In the case of an invalid NDC, the 'Link Item' box should be unchecked, and the accumulations should be cleared to the correct NDC being used. **NOTE** A tip/trick that can be used if wanting to delete the exception is clearing to a non-used item without linking the two numbers. This will get rid of the exception but, in order to prevent it from coming back across, user will have to update EMR system to appropriate NDC.

4. Highlight the description of matching item. Confirm item number should be linked to NDC (If not, uncheck 'Link Item' box).

5. Click the 'Clear' button.

| ALLOPURINOL | Search | Generic | Status | Mixed ▼ | ☑ Link Item | None ▼ | Value | Clear | Ignore Note | | Ignore |

Description	Mfg	Pkg	IP LP	OP LP	NC LP	Item #	NDC #	IP Cost	IPC	OP Cost	OPC	NC Cost	NCC	QOH
ALLOPURINOL TAB 300 MG 100UD	MYI	100	11/1/2019		12/5/2019	1284579	51079-0206-20	$49.820		$0.930		$56.840		0
ALLOPURINOL TAB 100 MG 100	AHI	100				5107057	16729-0134-01	$16.150		$0.870		$10.230		0
ALLOPURINOL 300MG TABS 10X10EA	AHP	100				3587094	62584-0713-01	$37.280		$0.930		$94.190		0
ALLOPURINOL TAB 100 MG 100UD	MYI	100				1422674	51079-0205-20	$24.150		$0.930		$29.210		0
ALLOPURINOL TAB 300 MG 100	MYL	100				1813922	00378-0181-01	$84.030		$0.930		$84.030		0
ALLOPURINOL 300MG TABS 100 EA		100				4368049	55111-0730-01	$25.610		$1.170		$25.610		0

6. Once clear button is clicked, a pop-up will appear that will show Item detail (make sure pop-ups are allowed).

    User can change status of item (i.e. mixed, inpatient), type in form EMR is using for quantity (i.e. TAB, ML), or add unit factor to code (i.e. multiplier, round to increment).

Item Information

Current Status:	**Mixed**
Change Status to:	Do Not Change ▼
Item Number:	**1284579**
Description:	**ALLOPURINOL TAB 300 MG 100UD**
Manufacturer:	**MYI**
NDC:	**51079-0206-20**
OP Quantity:	**7.0000**
IP Quantity:	**0.0000**
Form Override:	
BUV:	⚑
Vial Type (SDV, MDV):	
Package Size:	100
Package Size Note:	
Default Multiplier:	1.0000
OP On Order:	**0**

Import Codes 51079020600   [Add Code] [Refresh]

	Code	Unit Factor	Orphan Code	First Date	Last Date
✏ ⇄	51079020600				

Item Numbers

Item #	Description	MFG	Pkg Size
1284579	ALLOPURINOL 300MG TABS 10X10EA	MYI	100

7. Once reviewed, click on 'Save' button to save any changes or 'Close' button to close out without any other changes.

How to Clear an Exception for an Item Purchased from a Direct Vendor

1. From the *SplitNav* dashboard, click on the 'View Exceptions' button at the top left of the screen (see screenshot below).

2. Highlight the item to be cleared and change status in middle of screen from 'Mixed' to 'Direct'.

3. Type in NDC in NDC field, Vendor into Vendor field and Pkg Size into Pkg Size field.

4. Click on 'Convert to Direct'

5. Once clear button is clicked, a pop-up will appear that will show Item detail (make sure pop-ups are allowed).

    User can change status of item (i.e. mixed, inpatient), type in form EMR is using for quantity (i.e. TAB, ML), or add unit factor to code (i.e. multiplier, round to increment). See screenshot above from step 6 of 'How to Clear an Exception for an Item within the Item Catalog'.

6. Once reviewed, click on 'Save' button to save any changes or 'Close' button to close out without any other changes.

How to Clear an Exception that is a Compound

To clear a compound, the compound must first be created using the Compound Tool located under 'Inventory' then 'Compounds' link.

1. Click on 'Inventory' tab and then choose 'Compounds'.

2. Create your compound by naming it and clicking the 'Add' button. Once added, click the magnifying glass icon next to the newly created compound.

3. Search for the ingredients of the compound by typing in description or NDC of item in search box and clicking 'Search Inventory'. **NOTE** If item does not come up when searching, it may not be in virtual inventory. To add, go to Accruals page and click 'Add Item' button to search for and add to virtual inventory page. Once added, go back to compounds page and try again.

4. Once item is listed, click on description of item and a page will appear asking showing package size and asking for multiplier value. Unit factor can be used to ensure accuracy of accumulation. Value should equate to amount of this item being used within one dispense quantity of compound.

Compound Details for: GI Cocktail

Donnatal 100mL Bottle

NDC #	45678-9123-14
Mfg	Test
Pkg Size	100
Multiplier	Multiplier ▼
Value	10

[Add Item to Compound] [Cancel]

5. Once unit factor is set, click on 'Add Item to Compound' button and it will be added to list at bottom of page.

Compound Details for: GI Cocktail

Donnatal 100mL Bottle

NDC #	45678-9123-14
Mfg	Test
Pkg Size	100
Multiplier	Multiplier ▼
Value	10.0000

[Add Item to Compound] [Cancel]

[_____] [Add Code]

Code	Added
No records to display.	

	NDC #	Description	Manufacturer	Pkg Size	Unit Factor	Changed	
✏	45678-9123-14	Donnatal 100mL Bottle	Tes	100	Multiplier: 10.0000	6/17/2021 10:04:14 AM	🗑
✏	00054-3500-49	LIDOCAINE VISCOUS 2% 100ML	ROX	100	Multiplier: 5.0000	6/17/2021 10:04:49 AM	🗑
✏	78912-3456-78	Maalox 40mL Bottle	Tes	40	Multiplier: 30.0000	6/17/2021 10:05:12 AM	🗑

6. Repeat this process until all ingredients in the Compound are added. DO NOT add a code at this point. The Code will be added through clearing the exception.

7. Go to Exceptions page by clicking on 'Import Data' then 'Exceptions'.

8. Find compound on exceptions page and click to highlight.

9. Once highlighted, use search bar to type in description used for compound.

10. Click on description once compound is showing and then click 'Clear' button. Each ingredient will accumulate based on the unit factor set.

Ignoring Exceptions

To ignore an exception simply highlight the exception and click on the 'ignore' button. Any ignored exception can be returned to the Exceptions page by going to 'Import Data' then 'Ignored Exceptions' and clicking on the green arrow next to the description of the item to be un-ignored.

Screenshot of ignoring an exception:

Screenshot of un-ignoring an exception:

NOTE Do not ignore an item that the pharmacy is currently buying. Any item ignored will purchase on the default account which is the WAC account for DSH and Children's Hospitals.

Correcting an Incorrect Link

If a charge code is linked to an incorrect NDC or an inner NDC is linked to the wrong package or a dissimilar NDC, the steps below can be used to move that detail to the accurate NDC.

1. Locate the NDC with dispenses you would like to move to the correct NDC.

2. Navigate to: Import Data > Transaction Management > Text Search.

3. In the Text Search screen, search for the transactions you'd like to review using the following filter options:
    *   Start/End Dates
    *   Recommended to search by Transaction Date (Transaction date is the date Cervey received the transaction; Service date is the date of administration given by EMR)
        NOTE Please note you can only choose a 90 days at a time
    *   Uncheck the 'Enable Grid Paging' box
    *   Enter your NDC (of original item linked) or charge code used and click 'Search' button
    *   All dispenses that meet the criteria selected will populate at bottom of screen
    *   You can check all dispenses by using top check box or individually check/uncheck items listed

4. Once dispenses to move are found, move them to the accurate NDC using the following steps:
    *   Once the appropriate dispenses have been selected, click on the 'Change NDC of Dispenses' tab
    *   The dispense detail will stay at the bottom of the screen

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- Search for the NDC the dispenses should have gone too by using NDC number or description and clicking 'Search'
- Once the NDC is showing in the box below, highlight it and click 'Move Dispenses' button
- Wait for a pop-up notification that will appear once the dispenses have been successfully moved

Questions?

Call 800-710-9348