PHARMHOS
medications management

Merlin
Quick
Reference Guide

Dispense

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1. System Information

1.1. Merlin Software

Merlin is a program managed by Pharmhos Software to be adopted for use by Healthcare organisations and pharmacies. It is an integrated system that combines purchasing, imprest management and dispensing on a single platform.

All dispensing, purchasing, receiving and transferring of stock must be processed correctly in Merlin to ensure stock levels remain accurate and ordering efficient. This will also enable dispensaries to run 'perpetual stock' levels.

1.2. IT Set up– Centralised Model

Merlin is installed on a central server within the organisation network. This means there is a single Merlin program from which all sites run. This enables a centrally managed model where data is consistent across all sites. 'Filters' may be applied so that only the relevant data is displayed at each site.

1.3. Merlin Modules

The Merlin program comprises several core Modules.
- **Inventory:** purchasing stock and imprest management
- **Dispensing**: dispense and PBS
- **Additives**: compounded items
- **Debtor**: patient Billing
- **Clinical:** clinical management
- **PMI/ATD:** patient information master files

1.4. Interfaces with Merlin

Merlin has capability to interface with other programs and systems within the organization or health network such as:
- SAP (Supplier Accounts)
- Meditech(Patient Information and Billing)

Merlin interfaces to other programs and systems rely on an HL7 language standard to allow constant communication between the two systems. The bi-directional nature of the HL7 interface not only means that Merlin is populated with patient demographics (provided that the patient's hospital number is created upon admission to hospital) but also means that charging information is passed instantly into a Billing software, therefore migrating the need for Front Office/ Billing Staff to manually re-key charges.

1.5. Merlin Screen Layout

Merlin is a text based screen. This enables the system to operate at significantly faster speeds. It has a menu based structure however 'zooms' can be used for direct access to commonly used screens/tasks. Some general points to be aware of are as follows:

- Command prompts and error messages are usually displayed at the <u>bottom</u> of the screen.
- All screens contain 'Fields' which are numbered - navigation through the screen is by typing in the required field number and then pressing enter. Mouse clicking may also be used.
- Some fields are case sensitive so if an error message appears try retyping the commence in either upper/lower case
- Commands are usually typed into the **'Option Line'** at the bottom of the screen and reference is made to **'Field Numbers'** within each screen.
- It is important that certain keystrokes are learned - a list of commonly used keystrokes is provided below.
-

F	File	Finalizes and saves a transaction. Always appears on bottom of screen.
P	Print	
up/down arrows	Scroll Item	Scrolls items within a menu screen – highlight and press enter to select item
<>arrows	Scroll Page	Scrolls pages within a menu screen
/	End	This takes you to the bottom of the screen where you can file a transaction.
[	Zoom	Type this symbol before the zoom code to get to the zoom from any fields within Merlin. (This symbol is not required if the zoom is entered from the start up screen)
<....>	Pop Window	When a field heading appears in these brackets it means there is more information behind that field – press spacebar to 'pop' the window
?	Look Up	When a question mark appears in a field it is prompting the user to do a 'look up' if the relevant code is not known – type " ? " to display the look up table.
0	Today's date	In any field that requires a date to be entered, type 0 to default to today's date

1.6. Zooms

Zooms are shortcut commands that enable the user to go directly to a screen without having to go through the usual menu options. This can be useful when you do not want to exit your current page and lose already entered data. Points to note:

- Zooms can be typed in the main Merlin screen (top) or in any other field in Merlin if it is prefaced with a square open bracket " **[**".
- Zooms are not case specific
- A zoom may not work if the user does not have the appropriate permissions to access that screen.

2. Login and User Access

2.1. Merlin Login

The icon for the Merlin program is located on all computer terminals within pharmacy and stores (if applicable). The background program that runs Merlin is called **'Host Access'** which will open up when the Merlin icon is clicked.

To open the Merlin program:

- Double-click on the desktop icon to access the Merlin program.

Merlin

- This will launch Host Access. You will then have to log Host Access onto the Merlin application. The following login screen will appear
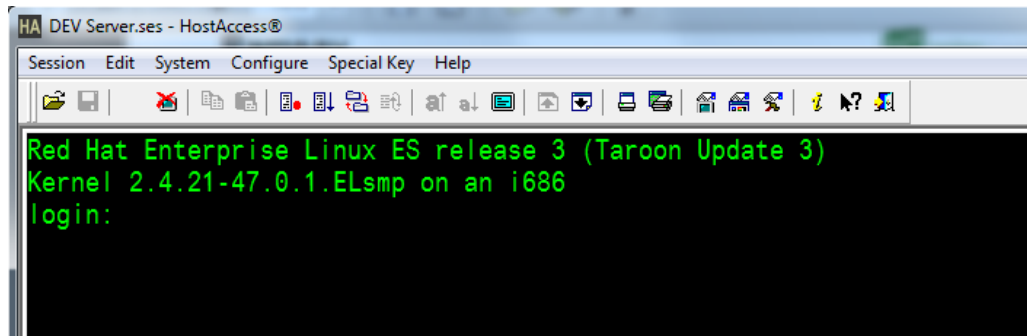
The Merlin program is open and ready for Login.

Once the program is opened there are 3 stages to logging in to Merlin as described below.

LOGIN STAGE 1: Login to the Merlin Program

Type in the following login details (case sensitive - use lower case):

- Login: **merlin** *– then <Enter>*
- Password: **merlin** *– then <Enter>*

(Note: The password will not appear in the screen as the letters are typed in)
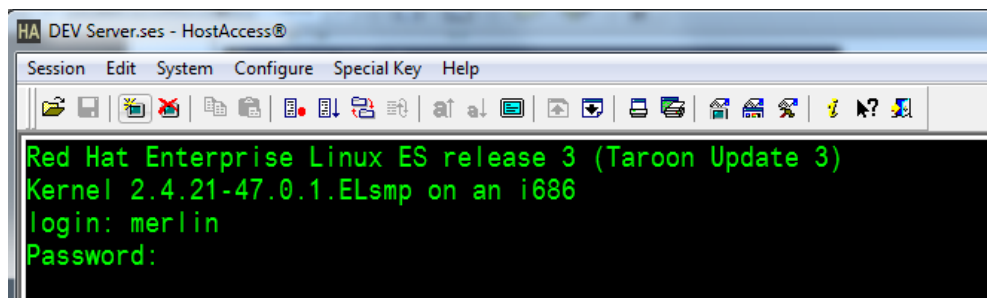
If a mistake is made do not use the <Delete> or <Backspace> keys. Instead type 'Ctrl U' to undo a mistake. Alternatively, press <Enter> so the system generates an incorrect login message and then try again.

LOGIN STAGE 2: Enter Location Identifier:

You will then be prompted for an "Input Location Identifier" at the bottom of the login screen. This specifies the location of your computer within the network and therefore defines the printer settings and filter settings at your workstation. These are predefined and named according to the site and computer terminal e.g. 187a. The functionality of Merlin may be compromised if an incorrect location identifier is used at this point.

Check the default settings are correct (refer to computer tags provided).
- If correct - Press **<Enter>**to allow the default settings to apply.
- If incorrect – type in the correct location identifier then press <Enter>.
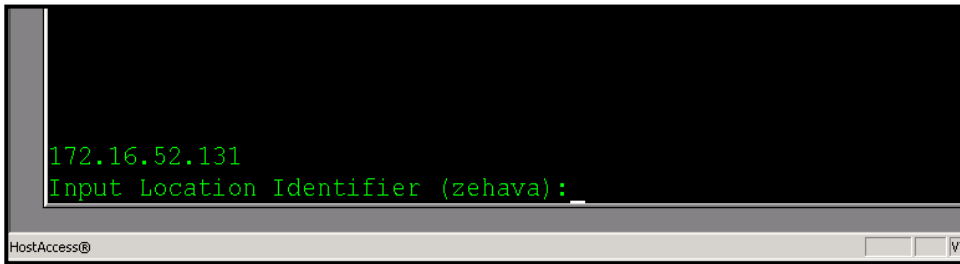
LOGIN STAGE 3: Enter your personal user name/password

See Section 2.2 – User Access.

2.2.   User Access

Enter your personal user name/password

After the general Merlin login, the following screen will appear and you will be prompted for your individual user ID and password.
- Enter your 3 letter user ID and then press **<Enter>**
- Enter your personal password and then press **<Enter>**
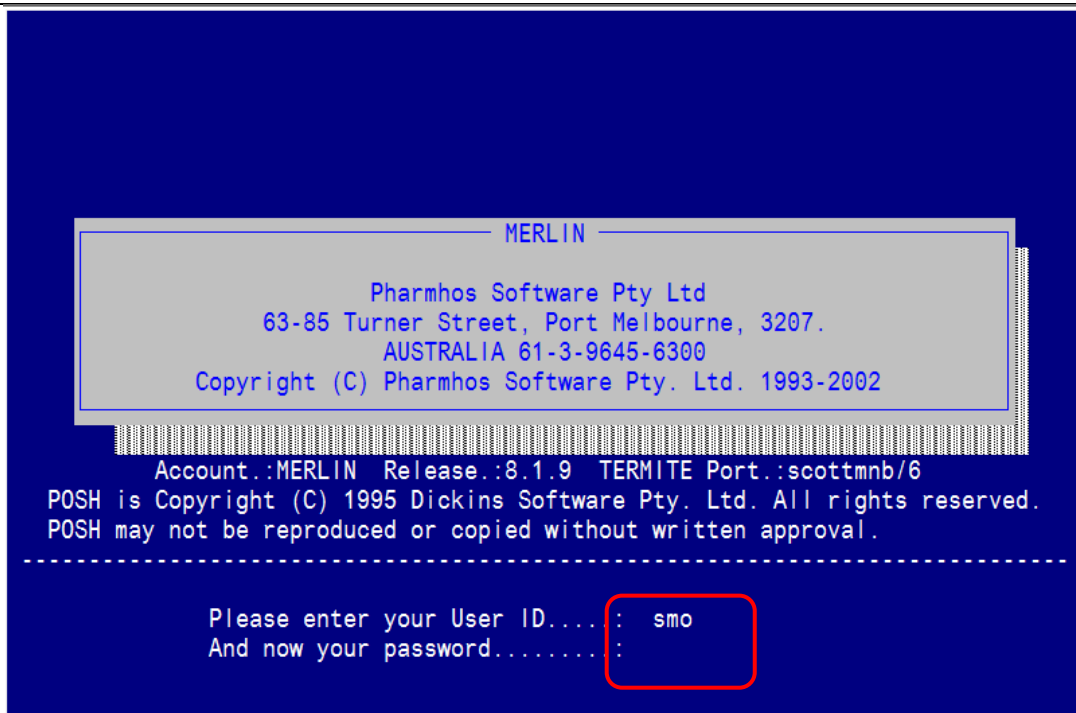
All staff have their own individual user ID. This is a 3 character code usually the first letter of your first name and the first two letters of your surname. If there is duplication then the third letter of your surname may be used e.g. John Smith is **JSM.** Staff are not able to alter their user names.

All sites also have a 'generic' user ID for casual/locum staff if required. This is the same as the 3 letter hospital code e.g. **GPH** is Generic Pharmacy

The user ID defines permission levels and what modules/menus are displayed on the start up screen. Most staff have a standard permission level however some may have higher permissions if they perform specialised roles with restricted functions.

A password is also required; you will be prompted to set your password the first time you login. Some tasks within Merlin may also require you to enter your user ID (and password) to enable specific transactions to be attributed to the relevant user.

If you do not know your individual user ID, forgot your password or require a new user to be set up please contact your Merlin system administrator.

2.3. Merlin Start Up Screen

The main start up screen appears as shown below. Some menu headings may not appear depending on your user settings and what modules you are required to access. Some reminder messages may also appear as pop up notes – press <Enter> to skip past these. Zooms can be entered into the Option Line on the top of the screen.
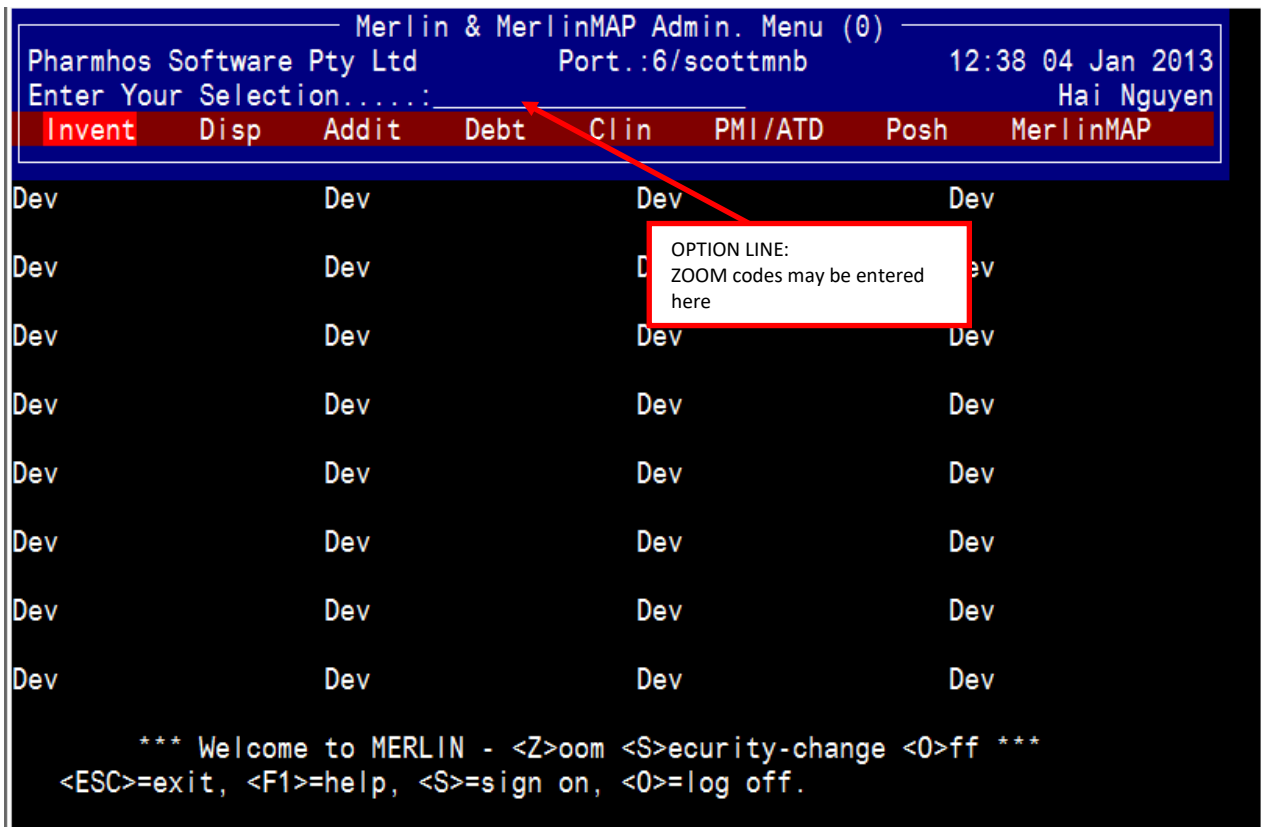
3. Product/Inventory Master File

The Product File is also known as the "Inventory Master File". This is centrally managed by the Purchasing Officer and cannot be edited by any other staff, unless they have privileges. All staff can view the Inventory Master File as follows:

> INVENTORY--> 2. Enquiry Procedures --> 1. Inventory Master
>
> Zoom: **INVMAST or PRODUCT**

Field 1: Type in the product INVENTORY CODE if known. Alternatively, do a drug search to find the relevant item (see section 3.3 below for drug search rules)

- The INVENTORY CODE and GENERIC CODE are displayed in the main Inventory Master screen.
- To view the *TRADE CODES* and *BRAND NAMES* - Type **28** at the Option Line**.**

A sample of a product record from the Inventory Master File is shown below. Specific fields within the Inventory Master File are described below.

```
 ─────────────── Inventory Master ───────────────
  1:Inventory Code ..: SIMV1
  2.Generic Code ....: SIM2
  3.Generic Name ....: SIMVASTATIN
  4.Strength ........: 10mg                    5.Form.: TABLETS
  6.PBS Conversion...:
  7.PBS Alternate UOM:
  8.Expense Account .: 17342    ......HYPOLIPIDAEMICS
  9.Product Group ...: TC       TABLETS / CAPSUL ──────Windows──────
 10.Product Type ....: D        DISPENSED       18<Stock Groups>
 11.Internal Issue ..: BOX/T                    19<Purchase Data>28<All>
                       BOX, TABLETS             20<Site Purchase Data>
 12.Units per Issue .: 30                       21<Substitute Items>
 13.Status ..........: N                        22<Stock Data>
 14.Shelf Life (days):                          23<Trans Enquiry>
 15.Intermediate Prod:                          24<Generic Data>
 16.WorkLoad Category:                          25<Comments>
                                                26<Tax Codes>
    Last Maintained .: 15/01/2010 12:00 BSD 0   27<Virtual Product>

Enter OPTION, <F1>=help....:_____                 (ICF.PRODUCT,E
<F> to continue
```

3.1. Merlin Drug Codes

Merlin is a generic based system - all items in the inventory Master are maintained under the generic name. There are three drug codes for each item in the Inventory Master File:

Code	Field No.	e.g.	Description
Inventory Code	Field1 (Main Screen)	SIMV1	This is always the first 4 letters of the drug (generic) and a number. The number is arbitrary and has no relation to the strength. **The Inventory Code is the main driver behind all products in Merlin and is what appears on the barcodes.** Drugs are assigned a unique Inventory Code on the basis of strength, form or pack size only. Multiple brands of the same drug share the same Inventory Code.
Generic Code	Field 2 (Main Screen)	SIM2	This is always the first 3 letters of the drug (generic) and a number. This links multiple pack sizes of the same drug for reporting/analysis purposes. Pharmhos updates are based on this code.
Trade Code	Field 19 &28 (Window)	ZOC3	This is always the first 3 letters of the drug (brand) and a number. Each brand has its own trade code. These are visible by selecting field 20 and 29, which are windows in the main product screen. Use the arrow keys to display the various brands linked to that Inventory Code. These are displayed in sequence in order of preferred brand and supplier.

```
                      ── Inventory Master ──
 1:Inventory Code ..: SIMV1
 2.Generic Code ....: SIM2
 3.Generic Name ....: SIMVASTATIN
 4.Strength ........: 10mg              5.Form.: TABLETS
 6.PBS Conversion...:
 7.PBS Alternate UOM:
 8.Expense Account .: 17342   ......HYPOLIPIDAEMICS
 9.Product Group ...: TC     TABLETS / CAPSUL    ── Windows ──
10.Product Type ....: D      DISPENSED     18<Stock Groups>
11.Internal Issue ..: BOX/T                19<Purchase Data>28<All>
                      BOX, TABLETS         20<Site Purchase Data>
12.Units per Issue .: 30                   21<Substitute Items>
13.Status .........: N                     22<Stock Data>
14.Shelf Life (days):                      23<Trans Enquiry>
15.Intermediate Prod:                      24<Generic Data>
16.WorkLoad Category:                      25<Comments>
                                           26<Tax Codes>
   Last Maintained .: 15/01/2010 12:00 BSD 0   27<Virtual Product>
```

3.2. Brand Ranking

Option 20 displays purchasing data, including trade codes.

The trade information (window 29) is displayed in a grey box as shown below. Items are listed in the screen in accordance with the Galen Catalogue with respect to Brand and Supplier ranking. The mapping of items in this screen will determine two important processes within the pharmacy:

1. Ordering Stock: The default brand/supplier that will be automatically ordered when item are scanned using the Denso scanner.
2. In the Dispense screen: the brand selection menu is presented in order of these rankings
The purchase cost of each item is also displayed in this window.

3.3.   Drug Search Rules

In any part of Merlin whenever the user is prompted to select a drug the drug the following search rules apply:

- To search by generic (preferred) - type in at least <u>4 letters</u> of the generic drug name
    - e.g. SIMV……
- To search by brand – type " **/** " and at least <u>3 letters</u> of the brand name
    - e.g. /ZOC….
- To narrow down the search type in the strength separated by a comma (no spaces)
    - e.g. SIMV,10
- To narrow down the search further type in the form separated by a comma (no spaces)
    - e.g. SIMV,10,t

The Drug Search look up window appears as follows:
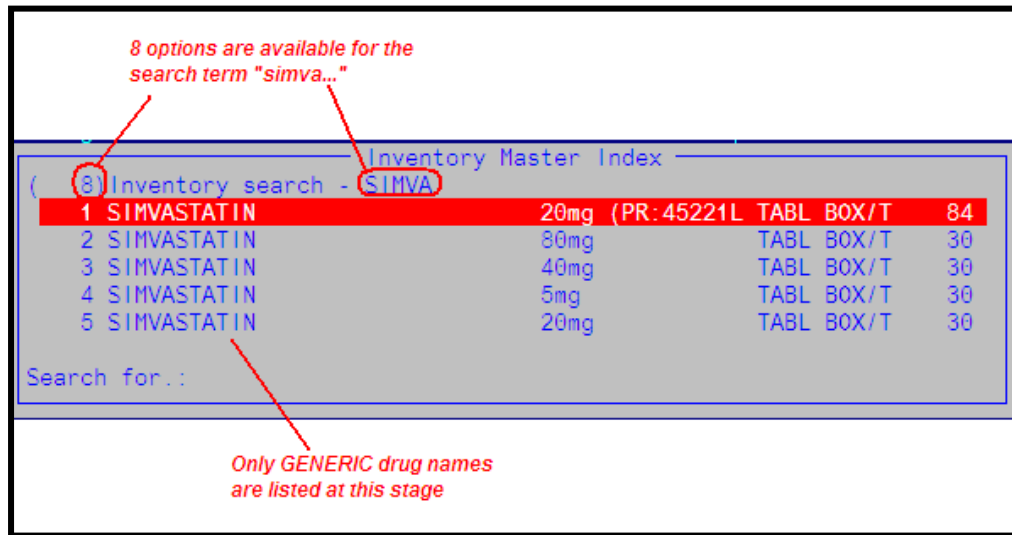
The number in brackets in the top left hand corner of this window indicates the number of items listed. Each page of the list can be quickly navigated using the ← and →arrows. Regardless of how the search is initially conducted, when the relevant item is selected it will display in Merlin as the Inventory Code (e.g. SIMV1)

3.4.   Product Barcodes

A barcode label is available for all products in the Merlin Inventory Master File for use in imprest cupboards and in the dispensary. Merlin barcodes are generic, based on the INVENTORY CODE of the product. When a barcode is scanned, Merlin automatically converts this to a branded product using the preferred brand rankings embedded within the system (see section 3.3 above).
 A trade brand may appear on the barcode only in the following circumstances:

- Dispensary - if multiple brands are required to be stocked in that area
- Imprest - if a specific brand is required to be used in that area
- The item has multiple ingredients and/or is difficult to identify based only on generic description.
  NB: This is not a proper trade barcode but just a normal barcode with a brand name included to enable product identification.

A sample of Merlin barcode labels is provided below.
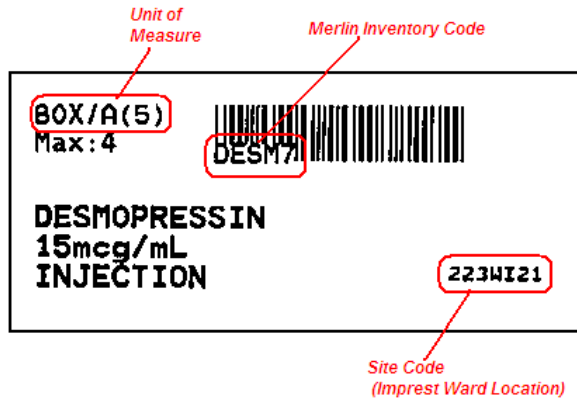
NORMAL BARCODE
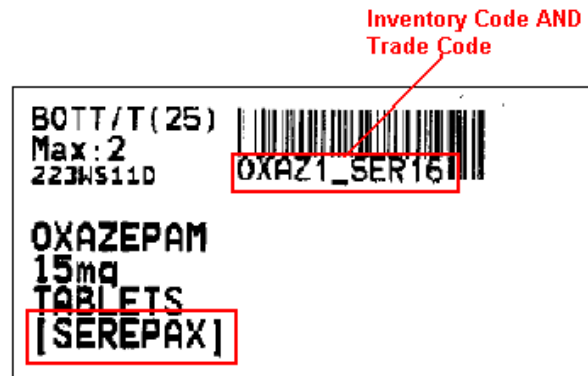
PROPER TRADE BARCODE
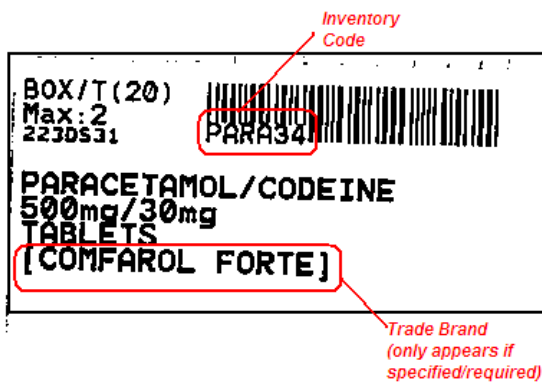
NORMAL BARCODE WITH BRAND NAME INCLUDED

3.5. PBS Status of a Product

The zoom **PBS** will allow you to quickly ascertain if a product is listed on the PBS (contains similar information as found on www.pbs.gov.au).

- Enter the first 3 letters of the generic or trade name (there is no need to prefix proprietary names with a slash **/**)
- Select the product from the PBS Lookup window (if search returns and PBS listed products) by pressing **Enter**

4.   Ward Set up

There is an overall set up model that is used for each Merlin as summarised in the table below:

Term	Description	EXAMPLE	
		Merlin Code	**Merlin Description**
Entity	Hospital	1	Generic Hospital
Main Store (**MS**)	Pharmacy or Dispensary. The storage location which supplies the Inventory Site (i.e. the pharmacy or dispensary)	PH01	Pharmacy Dispensary
Imprest Site (**I**) or (**IC**)	Ward/Imprest location. Each hospital usually has several Imprest Locations.	CCU	CCU
Sub Store (**SS**)	A sub-storage location for stock	NIGHT	After Hours Cupboard
Dispense Wards	Ward codes used in Dispense mode as per PMI/ATD system	ICU	ICU

Each imprest Inventory site and Dispense ward has a direct relationship to a designated Main Store (**MS**) to define where stock is routinely supplied from.

There is no direct relationship between the Imprest wards and Dispense wards in Merlin. A mapping table is provided to each site as a reference point in Merlin (this mapping is required for mapping with the feed from a PMI/ATD software).

4.1.   Ward Naming Conventions - Imprest

All imprest locations (Inventory Sites) are assigned a code in Merlin. Inventory Sites can be searched using the look up tables when prompted in the relevant field (Type "**?**"). To narrow down the search type in a part location description to list those locations associated with that hospital. Use the arrow keys to scroll through the options. An example is shown below.

```
┌──────────────── Location Look-up ─────────────┐
│ Location Location Descn        Site     Cost   │
│ Code                           Type     Centr  │
│                                                │
│ 1 MPP                                   Y7500  │
│ 2 126WL01  126 - CCU              IC    L2220  │
│ 3 234DS16  234 - (SUSP) PHARM MATERN IC 23428  │
│ 4 ABC      ABC TEST SITE          I     E0520  │
│ 5 PH-ABC   AVAPRO CENTRE          I     L2220  │
│ 6 CCU      CORONARY CARE UNIT     IC    L2220  │
│ 7 2WA      CORONARY CARE UNIT     I     L2220  │
│ 8 P-PH1    CORONARY CARE UNIT     I     L2220  │
│ 9 W1       CORONARY CARE UNIT     I     E0520  │
│                                                │
│ Select/search.:_____                │
│ You may search on: (Location Descn), <ESC>=exit.│
└────────────────────────────────────────────────┘
```

4.2. Ward Naming Conventions– Dispense

Dispense wards are **created in Merlin by a system administrator**. These should match the dispensing ward code from the PMI/ATD software codes (or HL7 ward code).

```
────── Wards / Site Look-up ──────
   Ward    Ward                      Site
   Code

   1 CCU    Cardiac Care Unit         CCU
   2 LMPWCC  LMP -CCU                  PH01
   3 0       TEST WARD                 PH01
   4 K4N     WAard K Level 4 North     RRR
   5 4B      Ward 4B - Neurology       PH01
   6 51      ward 51                   PH10
   7 31N     Ward K Level 4 North      ICU
   8 AA      WARD QQ                   CCU


   Select/search.:_____
   You may search on: (Ward,Site), <ESC>=exit
```

5. Dispensing

The Dispensing System has been designed as an integrated part of the Pharmacy (MERLIN) System.

```
────── Merlin Administration Menu (0) ──────
Pharmhos Software Pty Ltd     Port.:3/termite      13:48 11 Dec 2009
Enter Your Selection.....:_____          Anne Davies
  Inventory  Dispense  Additives  Debtors  Clin  PMI/ATD  System

Dev              ────── Dispensing Main Menu (1) ──────
                    1. Dispense
Dev                 2. Patient Information              ...
                    3. Stock Issue (Off-line) & Label Printer
Dev                 4. Label Printer
                    5. Enquiry                          ...
Dev                 6. Reports                          ...
                    7. Specialized Facilities           ...
Dev                 8. Reference File Maintenance        ...
                    9. Utilities                        ...
Dev                 10. Hospital Generated Options       ...

Dev         Dev              Dev              Dev

Dev         Dev              Dev              Dev

        *** Welcome to MERLIN - <Z>oom <S>ecurity-change <O>ff ***
       <ESC>=exit, <F1>=help, <S>=sign on, <O>=log off.
```

5.1. Charging & Health Funds

The charging destination in Merlin (i.e. Patient, Ward or Fund) is decided in the background, dependent upon a patient's health fund and the category that the medication is dispensed under. Users will have the ability to manually change the charge destination if they notice an error during the dispensing process. (Please see table relating to Field 16 below). This should not normally need to be changed. If there is an error with the setup at your site please contact Merlin support.

Self Funded patients are not covered by any Health funds when they attend a private hospital, instead they are electing to pay for the full cost of their treatment (including all drugs received) themselves. With this in mind all Self Funded patient will have all categories of drugs pointing to Fund charge. This will mean that every drug dispensed will be sent across to the patient's fund account in iPM or similar software.

The "Patient Category" screen is used to set up all dispensing billing parameters. The screen can be found in

> **Dispense** → 8.Reference File Maintenance → 2.Patient Category

```
┌─────────────── Patient Category (0) ───────────────┐
│                                                      │
│   1:Pt Category Code.:PR          15.Hospital.:      │
│   2.Description.......:Test private 17.PBS Appr.:    │
│   3.Patient Type.....:I   Inpatients 18.PBS Prov.:   │
│   4.Module Code......:P                              │
│   5.Workload Weight..:1         -- Mandatory Site -- │
│   6.S100 Claimable...:Y         19.Site Code  20.Applicable day │
│   7.CMI Prompting....:S          1              1    │
│    Billing Precedence            2              2    │
│   8.Order .......:  1 PR         3              3    │
│                    2 E                          4    │
│   9.Standard Fee ...$:                          5    │
│  10.Concession rate.$:                          6    │
│  11.General rate....$:                          7    │
│    --- Labels / Skip / Default ---                   │
│  12<Labels/Forms>  13<Skip Fields>   14<Defaults>  16<Interface Progs.> │
│                                                      │
│  Option.:_____                                 │
│  <F>=file, <ESC>=exit, </D>=delete, <#>=field no     │
└──────────────────────────────────────────────────────┘
```

```
┌──────── Dispensing Labels / Skip / Defaults (1) ─────────┐
    --- Defaults ---            -- Private Billing --
    1.Directions..........:Y    13.Ward Billing Method...:
    2.CAL's in Directions.:     14.Who Pays ............:
    3.Duration in days....:10   15.Charge Ward PBS Cont..:
    4.Quantity............:P    16.Charge Ward Pt Copay..:
    5.Rpt Available.......:P    17.Suppress PBS prompts..:
     -- Dispensed Price --      18.Remove PBS disp.fee...:
    6.Cost Based Method...:D    19.Remove PBS add. fee...:
    7.Fixed Base Method...:     20.Consignment stock on .:
    8.Sliding Scale Method:     21.Suppress fixed price .:
    9.Price Rounding......:D
      --- Parameters ---
    10.Check Imprest Lists..:N
    11.Date written default.:
    12.Prevent Owing default:


    Option.:_____
    <F>=file, <ESC>=exit, <#>=field no
└──────────────────────────────────────────────────────────┘
```

5.2.   Patient Information

5.2.1.   Enter/Update Patient Data (PMI)

The PMI (Patient Master Index) screen contains all the relevant patient data which is transmitted directly from the PMI/ATD application into Merlin via an HL7 interface. This includes the patient UR number, name, address, date of birth, ward, health fund etc. Throughout the course of the patient's admission the data is continually refreshed from the PMI/ATD application to Merlin e.g. ward move. Pre-admitted patients are also included in the PMI database e.g. oncology patients.

NOTE: Data can be updated in this screen by pharmacy staff but does not transmit back to the PMI/ATD application.

HL7 Interface → 1.PMI/ATD → 1.PMI Patient Master Index
OR
ZOOM: PMI

Field 1 – Search/Select/Enter Patient by **Hospital Patient Number** or **Patient Surname** followed by a comma then 1st name (does not need to be in full)

Update fields as required.

Type **F** to save details.

The screenshot below shows the Patient Master Index screen and associated fields.

```
Pharmhos Software Pty Ltd                          Port:chris/7        12:59:30 06 Dec 2010
   1:Hosp Pt Number:_____
   2.Patient Class (Non Inp)..:        17.Sex.......:    23.Medicare No...:        24.Exp.:
   3.Title:   4.Surname.....:          18.Race......:    25.Pension No....:        26.Exp.:
   5.Given name(s).:                   19.Religion..:    27.DVA No........:        28.Exp.:
   6.Date of Birth.:                   20.Language..:    29.CN/SN No......:
   7.Street Addr 1.:                   21.Marital...:
   8.Street Addr 2.:                   22.Country...:
   9.Town.........:
  10.Postal Code..:
  11.Phone (H)....:                    30.Health Fund...:        34<Visit Details>
  12.      (O)....:                    31.Fund Cover....:        35<Extended Info>
  13.Contact Name..:                   32.Current Visit.:
  14.Contact HPhone:
  15.Contact WPhone:                   33.Date of Death.:
  16.Contact Rel...:
```

5.2.2.   Update Patient Extended Information

The 'PMI Extended Information' Screen contains patient data specific for PBS claiming including Medicare, Concession, Repat and Safety Net numbers. The data initially transmits from the PMI/ATD application but can be overridden/updated by pharmacy staff and will remain intact regardless of the PMI/ATD application data. This information is displayed in the normal PMI screen (fields 23 to 27). The 'Patient Extended Information' screen also includes patient notes, allergies, S100 status and weight/height/BSA/CrCl details.

HL7 Interface → 1.PMI/ATD → 1.PMI Patient Master Index → Field 35.Extended Information
OR
Dispense→ 2.Patient Information → 3.Patients-Extended Information
OR
ZOOM: PTX

Field 1 – Search/Select/Enter Patient by **Hospital Patient Number** or **Patient Surname** followed by a comma then 1st name (does not need to be in full)

Update fields as required. (Refer to Section 5.5 Patient Entitlement)

Type **F** to save details.

```
──────────── Patient Master Index Extension (1) ────────────
  1:Pt.: 123456    MORRISON, SCOTT, 53 MAYSTON STREET HAWTHORN EAST 312
  2.Medicare : 3298335012_ 3.Member:    4.Exp.:       13<PBS S100 >
  5.DSS Conc/Pens.:           6.Exp.:                 14<Notes    >
  7.DVA Repat. No.:           8.Type:                 15<Allergies>
  --- HIC CN / SN Annual Cards ---  9.Cond:
 10.Year  11.Card No       12.Issue date   16<<Weight/Height/BSA/CrCl>
  1                                                   Last update
  2
  3
  4
  Option.:_____    New
  Enter 10 digit number (card issue No. is required)
```
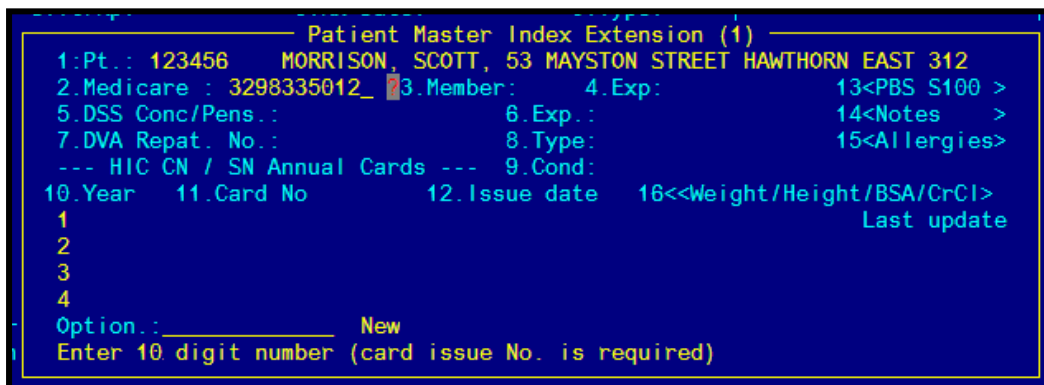
5.2.3. Add a New Patient (non HL7 feed)

There are occasions when it may be necessary to manually add a patient in Merlin i.e. they are not entered into Meditech and will therefore not transmit via the usual interface. When these situations occur, use the Patient Master Index (PMI) screen to add the patient manually.

HL7 Interface → 1.PMI/ATD → 1.PMI Patient Master Index
OR
ZOOM: PMI

- Field 1 (*Hosp pt number*): Type the **+** symbol and press the **ENTER key**. This allocates the next available unique identification number for the patient to be added. This becomes the patient's UR number which is manually allocated by Merlin. NB: These 'manual' UR numbers are not prefixed with any letters (as per inpatient UR format). These patients are not filtered and therefore visible to all sites in the patient look up screen. – Search/Select/Enter Patient by **Hospital Patient Number** or **Patient Surname** followed by a comma then 1ˢᵗ name (does not need to be in full)
- Field 2: Skip and leave blank
- Continue to add details as required according to what is available.
- Type **F** to file the patient.

5.3. Patient Notes, Alerts and Allergies

5.3.1. Patient Notes

- o **Dispense→Dispense**
- o Or select Field 14.Notes in the Patient Extended Information window
- o OR **Dispense → 2. Patient Information → 7. Patients – Note Pad**

To add a Patient Note:
- o Search/select patient by name or UR number (or press Enter to accept the default UR displayed).
- o Type 3 at the Option Line to go to the text field.
- o Type note as free text. Multiple lines can be added.
- o When finished, press the TAB key and then ENTER to file.
- o Type <F> to save the screen.
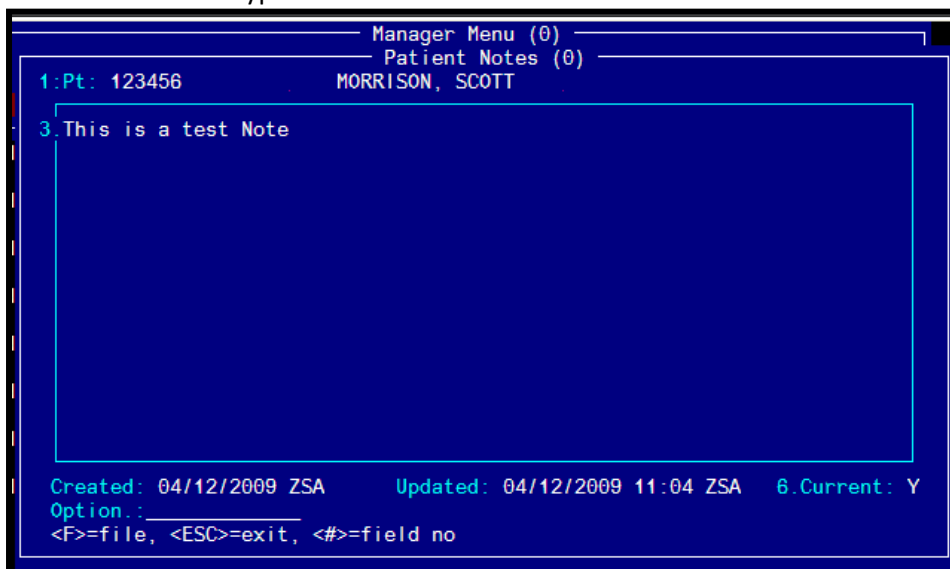
> *You can only file ONE page of notes each day. If you want to make multiple notes for the same day, you must separate each entry by a line.*
> ***Ensure each individual note begins with the DATE and finishes with your three character USER INITIAL. The first 5-6 words should include a description of what the note is concerning so that it may be easily viewed in the note history.***

To view previous notes for a patient:

- Highlight and press **Enter** on a previous note to view it. Press **Esc** if you want to create a new note for the day.
- When finished, press **Tab** and then **Enter**
- **File** when completed

```
┌──────────── Select Note To View - or ESC ────────────┐
( 34)Date        User  Note                        Curr
   1 27/11/2012  HAI                                N
   2 12/11/2012  ASG    -- Gentamicin --            N
   3 07/05/2012  HAI                                N
   4 03/05/2011  ASG    AAAAAAAAAAAAAAAAAAAAAAAAA    N
   5 23/03/2011  ASG    -- Gentamicin --            N
   6 01/02/2011  ASG    -- Gentamicin --            N
   7 27/09/2010  PAM    -- Gentamicin --            N
   8 05/08/2010  PAM    -- Gentamicin --            N
   9 08/07/2010  RIL    This is a sticky note       N
  10 03/07/2010  PAM    -- Amikacin --              N

Search for.:
```

Notes also appear in chronological order in the patient detailed history - they do not appear in the normal history.

```
Pharmhos Software Pty Ltd        Port:scottmnb/2    15:36:03 15 Feb 2013
    Pt:MORRISON, SCOTT C/- Pharmhos Software 63-85 Turner Street PORT ME
Date Script/It/Rp    Drug/Directions                Qty    Pt Phm  Rp
03/12/2012#          CIPROFLOXACIN 500mg TABLETS (CIFRAN)   14   D  VT   0
D A   24322  1  0                                 Patient: $32.85
                                                  Invoice# 1183
Dr D Saturday         Ward: Cardiac Care Unit
Written: 03/12/2012
-------------------------------------------------------------------------
12/11/2012  Notes by ASG
    -- Gentamicin --

    Admin Start: 12/11/2012 09:00
    Admin Stop:  12/11/2012 09:30
    Dose interval:  24.0 hr
    1st Blood Sample: 12/11/2012 09:40 Level: 23 mg/L
    2nd Blood Sample: 12/11/2012 17:00 Level: 3 mg/L
    Peak: 24.1 mg/L
    T 1/2: 2.5 hr
    Area under curve: 92.2 mg/L hr
    24hr average AUC: 92.2 mg/L hr
Enter OPTION, <F1>=help....:_____        PHD.DISP.DETAILED,M)
<UP>/<DOWN>=page <N>=notes <ESC>=exit
Printing - <P>=print this page <PA>=all <PD>=date range
```

5.3.2. Add a patient alert

Alerts appear every time the patient is selected in the Dispense screen as a prominent pop up window. They do not appear in the patient history. ALL alerts must be read and updated regularly.

```
─────────────────── Patient Alert Entry (2) ───────────────────
 1:Patient..:123456      MORRISON, SCOTT
      DOB 15/09/1964    53 MAYSTON STREET HAWTHORN EAST 3123
 2.Date     3.Alert Message                              4.By
  1 04/12/2009  Patient Requires 4 weeks supply on discharge >ZSA
  2 _____
  3

   Alert updated.:
 Option.:_____    New
 Enter Date the Alert to apply from <0>=today
```

- In any field, type [**alert** and then press **Enter**
- Or **Dispense → 2. Patient Information → 4. Patients – Alerts – Pharmacy Based**
- Search/select patient by name or UR number (or press Enter to accept the default UR displayed)
- Type **2a** at the Option Line to add a note (to the next available line in Field 2).
- **Field 2**: Enter date (type '0' for today's date)
- **Field 3**: Enter alert message (free text)

> *Note: If the details in Field 3 go off the visible screen, complete the message on the next line*

- **Field 4**:Enter user ID
- Press ENTER to jump down to the Option Line.
- In the option line type F to file.

5.3.3. Record a Patient Allergy

Merlin can record allergies by medicinal product (using the AMT MP description). These allergies are recalled when a user attempts to dispense a medication from that class of medicines.

```
────────────── Patient Drug Allergies/Conditions (1) ──────────────
 1.Adverse Drug Reaction to                    2.Date     3.By
 1 acamprosate                                 11/07/2012 HAI
    4.Remarks:rash
 2 abacavir + lamivudine                       27/06/2012 HAI
            rash 2008
 3 esomeprazole (&) clarithromycin (&) amoxycillin  05/06/2012 TEST
            rash, 2010
 5.Last Date Confirmed:13/02/2013
 Option.:_____
 <F>=file, <ESC>=exit, <#>=field no
```

- **Dispense → 2. Patient Information → 3. Patients – Extended Information → Field 17 <AdverseDR>**

- Type **1a** at the Option Line
- **Field 1:** Use the '?' to search available AMT MP codes

```
┌─────────── Patient Drug Allergies/Conditions (1) ───────────┐
│              ┌───────────── AMT MP Lookup ──────────────┐   │
│ (1765)AMT Id            AMT Description                  │   │
│    1 21664011000036103     ABACAVIR                      │   │
│    2 21390011000036103     ABACAVIR + LAMIVUDINE         │   │
│    3 21556011000036109     ABACAVIR + LAMIVUDINE + ZIDOVUDINE │ │
│    4 33635011000036100     ABATACEPT                     │   │
│                                                          │   │
│ Search for.:                                             │   │
│              └──────────────────────────────────────────┘   │
│  Enter any patient drug allergies or conditions.            │
└──────────────────────────────────────────────────────────────┘
```
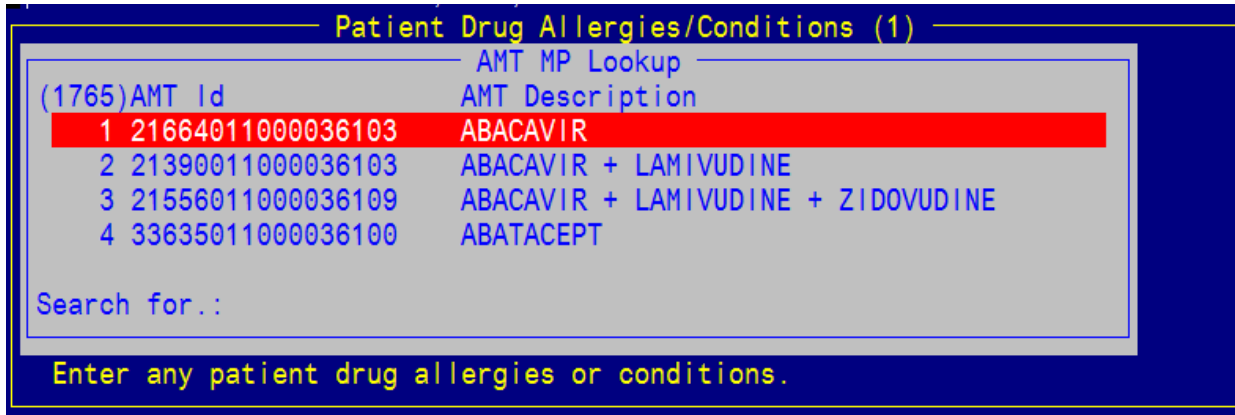
- **Field 2:** Enter the date of the reaction
- **Field 3:** enter User ID
- **Field 4:** Enter Remark (free text)
- Further entries can be made on Row 2, OR press **Enter** to jump to the option line
- Type <**F**> to save the record

5.4. Patient Medication History

5.4.1. Patient Dispensing History

The Patient Medication History displays automatically when the patient is selected in the dispense screen. The patient history can also be retrieved/displayed any time using the zoom code **[prof.**

Select patient by entering UR number or search by patient name

This provides the standard Patient Medication History which displays the following:
- Dispense Date
- Drug
- Quantity
- Patient Category
- Pharmacist/User
- Number of Repeats remaining
- Main Store (pharmacy) items dispensed from
- Script Number
- Directions

The History may also indicate the following about each script:
- If the script has been edited (# symbol)
- Open Status (script Filed but not Printed yet)
- Paperless claim item (C)
- Owe status (owe)
- Dispensing site (i.e. JP, AV, etc)
- Deleted Status (Term'd)

Each script occupies 2 lines and is listed in reverse date order (most recent item listed on top). Each script is designated a line number. Use the up/down arrows to scroll through the history.

```
Pt:
    Date   Script/It/Rp   Drug/Directions                    Qty  Pt Phm  Rp  Tag
  1 07/05/2011#            GABAPENTIN 300mg CAPSULES         100   A ECO   0
    D SG   90239  1  0      Take TWO capsules THREE times a day.
  2 05/05/2011#            HYDROMORPHONE 2mg TABLETS          20   A ECO   0
    D SG   87800  1  0      Take half a tablet (=1mg) at NIGHT.
  3 05/05/2011             BEVACIZUMAB 400mg/16mL VIAL         1   A KLO   0
    D SG   87664  1  0      Use 400mg intraperitoneally as per Dr. L.....
  4 04/05/2011#            RABEPRAZOLE 20mg TABLETS           30   A NMC   0
    D SG   86828  2  0      Take TWO tablets (=40mg) at NIGHT.
  5 04/05/2011#            GABAPENTIN 300mg CAPSULES          15   A NMC   0
    D SG   86828  1  0      Take TWO capsules (=600mg) THREE times d.....
  6 03/05/2011#            SPIRONOLACTONE 25mg TABLETS       100   A ECO   0
    D SG   85915  2  0      Take ONE tablet THREE times daily.
  7 03/05/2011#            MAGNESIUM ASPARTATE 500mg TA       50   A ECO   0
    D SG   85915  1  0      Take TWO tablets THREE times daily with .....
```

5.4.2. Explanation of Patient Dispensing History

Column1: Number to select for the required prescription items.

Column 2: Date that the prescription was dispensed.

Column 3 (under the date dispensed) : Type of prescription.

"D" indicates that the prescription has been dispensed

"A" indicates that the item is an additive.

Column 4 (next to the type of prescription): The letter indicates which store the prescription was dispensed from.

This is set in: Dispense -> Utilities-> Dispensing Customisation Parameters -> 10. Site Details -> Field 8. Site Ind: The letter associated with the site.

Column 5: Prescription number/Item/Repeat dispensed.

Column 6: Drug and directions.

Column 7: Quantity dispensed.

Column 8: Patient Category

Column 9: Pharmacist who dispensed the prescription.

Column 10: Number of repeats remaining.

Column 11: Tag – when the item is selected for any reason, the "#" will appear in this column.

Note: When you have finished looking through it, press ESC.

5.4.3.   Detailed Patient History

- In any field, type **[DETAILED** then press **Enter**
- Or **Dispense → 2. Patient Information → 2. Patients – Full Profile and Notes**
- In the *PI* field enter **UR number** or **patient surname in** full followed by a comma then first name (does not need to be in full)
- The Detailed Medication History displays all the detail of the normal history plus the following additional information:
  - Doctor
  - Script Date
  - Ward
  - Charge
  - Brand
  - Bill to (Ward/Patient/fund)
  - Patient Notes
- To view, scroll with the **up** and **down arrows**

NB: Items cannot be tagged/ edited from this screen

```
Pharmhos Software Pty Ltd          Port:scottmnb/3      17:07:13 04 Feb 2013
    Pt:NGUYEN, HAI 1 TEST ST TESTVILLE DOB 31/03/1982
Date Script/It/Rp    Drug/Directions                   Qty    Pt Phm   Rp
01/02/2013#          PHENOXYMETHYLPENICILLIN             1     O  HAI    0
D A   24338  1  0    150mg/5mL(100mL) (as benzathine)   Patient: $19.35
                     SUSPENSION (CILICAINE V)
DR D SATURDAY        Clinic: A TEST CLINIC
Written: 01/02/2013
-------------------------------------------------------------------------
01/02/2013           PHENOXYMETHYLPENICILLIN             2     O  HAI    0
D A   24337  1  0    150mg/5mL(100mL) (as benzathine)   Patient: $26.95
                     SUSPENSION (CILICAINE V)
DR D SATURDAY        Clinic: A TEST CLINIC
Written: 01/02/2013
-------------------------------------------------------------------------
01/02/2013           CISPLATIN [VPBS] 1mg INFUSION      200mg  O  HAI
D A   24333  1  2                                        Patient: $0.00
Dr J SMITH           Clinic: A TEST CLINIC
Written: 24/01/2013
-------------------------------------------------------------------------
25/01/2013           METRONIDAZOLE 400mg TABLETS (FLAGYL  21    A  HAI    0
Enter OPTION, <F1>=help....:_____          PHD.DISP.DETAILED,M)
<UP>/<DOWN>=page <N>=notes <ESC>=exit
Printing - <P>=print this page <PA>=all <PD>=date range
```

5.4.4. Merge Patient Dispensing Histories

Merlin has the ability to merge patient histories. Please be aware that this process cannot be reversed once actioned.

DISPENSE ► 7. Specialised Facilities ► 1. Patient Drug Profile - Merge to New UR No.

- **Field 1: Script No.** Enter the script number (if known) if it is just one item that you want to merge with a different patient. Typing an '*' (asterisk) will select all. The message below will be displayed if (*) all are selected. Press 'Y' to continue.
- **Field 2: Old UR No.** Enter the old UR, or the UR number of the patient whose profile contains the information that you want to merge. If the UR is unknown, it is possible to search using the usual patient search rules.
- **Field 3: New UR No.** Enter the UR number of the patient that you want the selected script(s) to be merged with. If the UR is unknown, it is possible to search using the usual patient search rules.
- Check the above details very carefully. This finalising this process is an irreversible action.
- Press **F** at the option line to save the merge.

```
┌──────────── Dispensing - UR No. Merging (0) ────────────┐
│ This process will update ALL Items and Repeats processed on │
│ 1.Script No. .: *_____                    4<Script Details> │
│ 2.Old UR No. .:                               │
│                                               │
│ 3.New UR No. .:                               │
│                                               │
│ Option.:              <\> to clear            │
│ Enter Script No. or <*>=ALL                   │
└───────────────────────────────────────────────┘
```

5.5. Patient Entitlement

5.5.1. Enter Safety Net and Concession numbers

- In any field type **[PTX** and **Enter**
- Select your patient or press **Enter** on the existing patient number

```
┌──────────── Patient Master Index Extension (1) ────────────┐
│ 1:Pt.: 123456   MORRISON, SCOTT, 53 MAYSTON STREET HAWTHORN EAST 312 │
│ 2.Medicare : 3298335012_ ?3.Member:   4.Exp:        13<PBS S100 > │
│ 5.DSS Conc/Pens.:              6.Exp.:              14<Notes    > │
│ 7.DVA Repat. No.:              8.Type:              15<Allergies> │
│ --- HIC CN / SN Annual Cards --- 9.Cond:            │
│ 10.Year  11.Card No      12.Issue date  16<<Weight/Height/BSA/CrCl> │
│ 1                                          Last update │
│ 2                                          │
│ 3                                          │
│ 4                                          │
│ Option.:_____  New                  │
│ Enter 10 digit number (card issue No. is required) │
└────────────────────────────────────────────────┘
```

- In Field 5 **DSS Conc/Pens** enter the patient's concession number along with expiry (Field 6).
- In Field 10 enter the year the safety net card was issued.
- In Field 11 **Card No** enter the Safety Net number (including the prefix CN or SN)
- In Field 12 **Issue date** enter the date the card was issued (or if unknown, put today's date)
  DVA concession numbers and colour of card can be placed in Fields 7 and 8, with Field 9 allowing the entry for specific conditions relating to a DVA white card.

5.5.2. Enter Patient Safety Net Contribution (from an outside pharmacy)

- In any field type **[SNET** and **Enter**
- **OR** Dispense → 2. Patient Information → 8. Patients – Safety Net Totals
- Select your patient or press **Enter** on the existing patient number
- Ensure Field 2 **Year** states the current year
- In Field 3 **Contributions at other pharmacies** enter the total dollar value of all contributions.
- In Field 4 enter the number of contributions made (number of dispensings).

```
            PBS Safety Net Contributions (1)

 1:Patient..: 123456                2:Year..: 2009
   MORRISON, SCOTT

   --- This Patient's Contributions ---      Value    Items
   Contributions at this pharmacy.....:                   0
 3.Contributions at other pharmacies..:            4.     0
   Total contributions................:       0.00        0

   -- Family Member's Contributions ---      Value    Items   UR Nos.
   Contributions at this pharmacy.....:       0.00        0
   Contributions at other pharmacies..:       0.00        0
   Total contributions................:       0.00        0

   ------- Total Contributions --------      Value    Items
   Contributions at this pharmacy.....:       0.00        0
   Contributions at other pharmacies..:       0.00        0
   Total contributions................:       0.00        0
 Option.:_____
 <F>=file, <ESC>=exit, <#>=field no, <R>=rebuild
```

5.5.3. Issue a Safety Net Card

If a patient has reached the Safety Net limit, Merlin will prompt the user at the time the next script is dispensed. Follow the prompts on the screen to issue the safety net number.

5.6. Doctor details

Pharmacy Staff can update Doctor details and add in new doctors however strict conventions do apply as outlined in the process below. **Before adding a new doctor always check the Master Doctor File first** as the doctor may be in the system but just not mapped to your hospital (field 17 – filter code). If a doctor is mapped correctly to that site, then it will appear in the dispense screen when searching for a doctor (field 7).

Casual/Blank doctors cannot be set up in Merlin. If the item is claimable the doctor must be entered in correctly using all available details including the prescriber number. A 'CASUAL' Doctor (no prescriber number) is in the Doctor File is available for use by all sites if required - this can only be used for non PBS dispensing.

- In any field type **[DOC**
- In field 1 Doctor Code, search to see if the Doctor already exist in Merlin. This can be done by typing **?**, then entering the first few letters of the surname.
- If the doctor code does not exist, press ESC and proceed to type in *a suitable Dr code.* This can be the:
    - Prescriber number
    - A combination of the first 3-4 letters of the surname, followed by next available number
    - A number automatically generated by Merlin
    - Suitable code unique and identifiable to the prescriber e.g. the employee number.
- Note: if using the Merlin automatic generated Dr code method, Type + and press **Enter** to receive the next available Merlin generated doctor code.
- Type **Y** to the message *Create new record.*
- Enter the doctor's surname (in uppercase), first name, title, prescriber number (in Field 9 PBS No), and address (see next step).

> *Example of address:*   *Address1:*   *Level 2 Springfield Medical Centre*
> *Address2:*   *40 Test Street*
> *Suburb: Springfield*
> *Post Code:*   *4017*
> *Please use capital letters and lower case letters exactly as shown above. These will eventually print out on the pharmacy generated prescriptions exactly as they are written and therefore need to be accurate for the prescription to be legal.*

- Additional phone numbers can be entered into field 18 Teledex
- The Script Owe method must be specified (RxOwe - field 15) if utilised.
- The filter code must be applied to indicate which hospital the doctor works at. This ensures you only see the doctors relevant to your hospital when dispensing.
- Type **F** at the option line to save the record.

```
┌──────── Doctors - Pharmacy Dispensing (incl. external) (1) ────────┐
│ 1:Dr Code..:8015648      10.PBS No:8015648    18.Filter Codes:      │
│ 2.Surname..:Saturday     11.Pres. Type..:M     1 001   MAIN HOS     │
│ 3.Given....:David        12.Dental......:N      2 SHS01             │
│ 4.Address 1:1 Test Street 13.Optometrist.:N     3                   │
│ 5.Address 2:Doctorsville 14.Tel :9645-6300                          │
│ 6.Sub/State:Qld          15.Specialty:      16.RxOwe Method:0       │
│ 7.Post Code:4066         17.Email:bdonaldson@pharmhos.com           │
│ 8.Title:Dr    9.Cred.:MBBS   19<Teledex >    20<Warrants & IDs>     │
│ Option.:_____                                                    │
│ <F>=file, <ESC>=exit, </D>=delete, <#>=field no                     │
└─────────────────────────────────────────────────────────────────────┘
```

5.7. Dispense – Standard In-house PBS Prescription

This section describes how to dispense a prescription. Details on how to process other scenarios are described in Section 12 (e.g. repeats, authorities, edits etc.).

To get to the Dispense Screen, arrow across to DISPENSE on the top menu bar and press ENTER twice
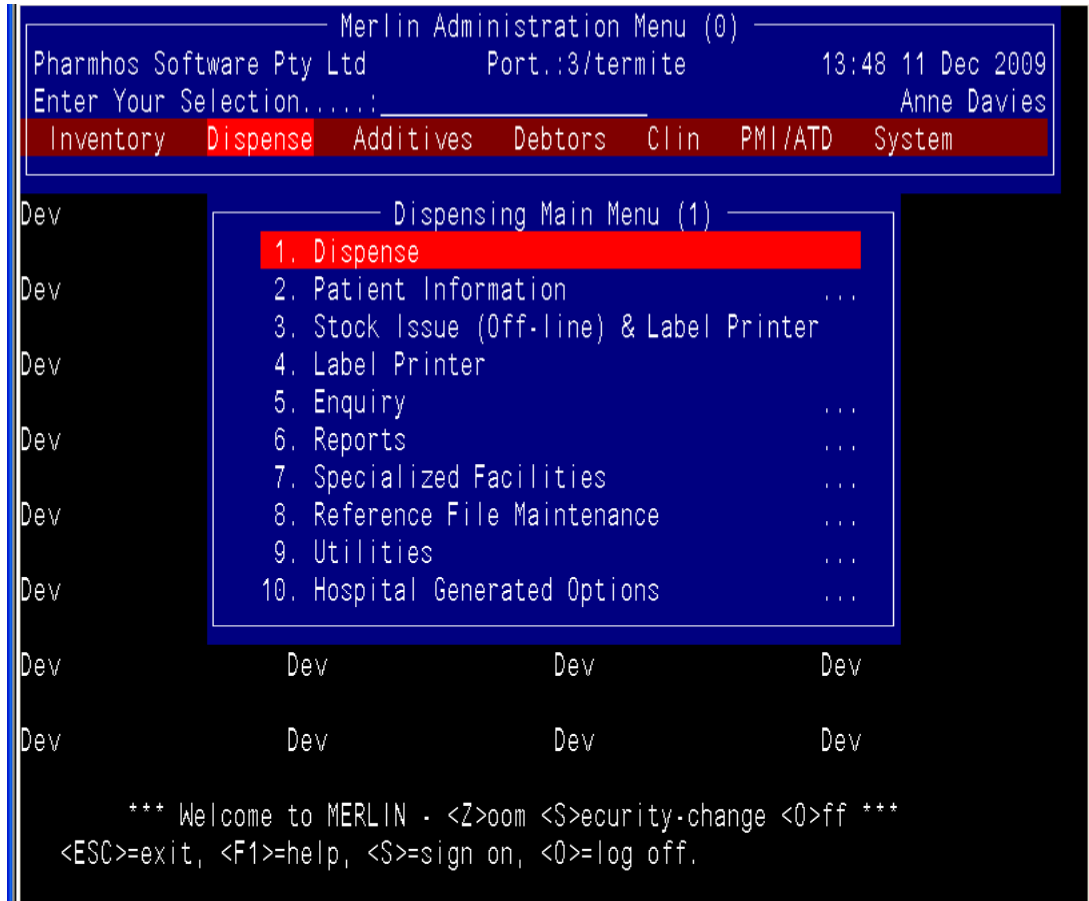
When you enter the Dispense screen you may be prompted to select the main store (pharmacy) from which you are operating. If not it will default to your main store based on the login code.

Each Field in the Dispense Screen is described below (section 7.2.1)

PBS Online: When the store is selected, a list of all PBS scripts recently processed on that terminal will appear on the right hand side of the screen.

5.7.1. Dispense Screen Layout

The top of the Dispense screen displays the Main Store (pharmacy) from which the transaction is being processed. The PBS Online live status is also indicated at the top of the screen in green. If the PBS online status is red, this means that there is an issue with PBS online. Refer to Section 10.3.2 – Is Medicare PBS Online Running?.

The Dispense screen is divided into 4 key sections:
- Dispense Data (as entered by user)
- Patient Information (as per PMI/ATD interface)
- PBS and Billing Data
- Profile/PBS Online/PBS Authority Panel

DISPENSE DATA:
This is where user enters all script data in Fields 1 to 20.

PATIENT DATA:Imported from PMI/ATD interface. Includes concession details and reason for admission
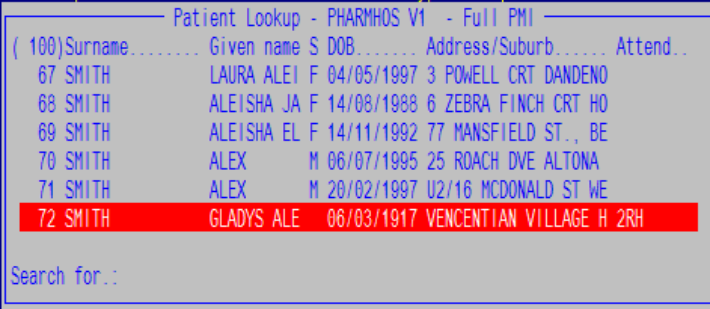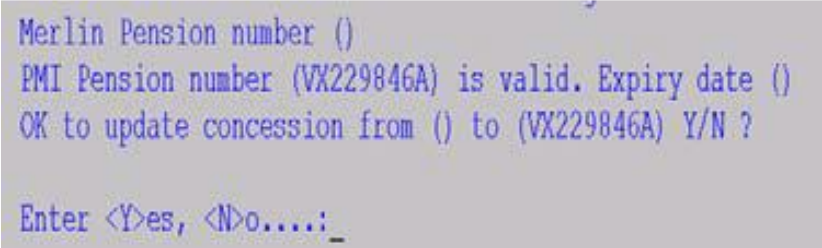
BILLING DATA:
Includes health fund, PBS status, item cost etc.
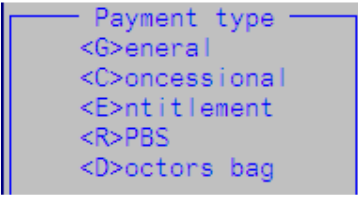
PATIENT PROFILE/ PBS ONLINE/ PBS AUTHORITY PANEL:
Displays patient medication history, PBS Online Status and PBS Authority information
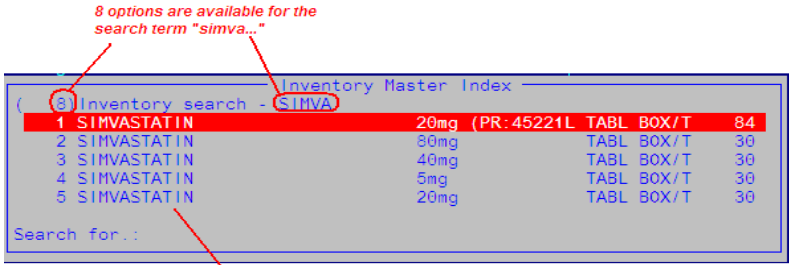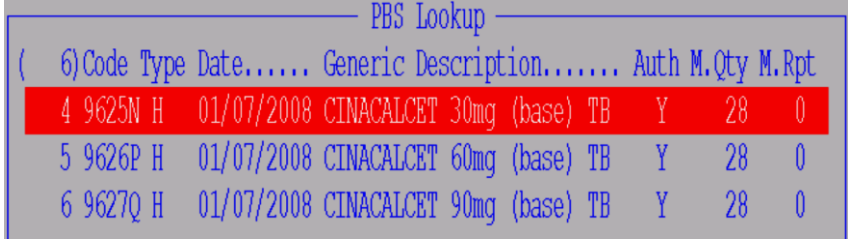
5.7.2 Dispense using Fields
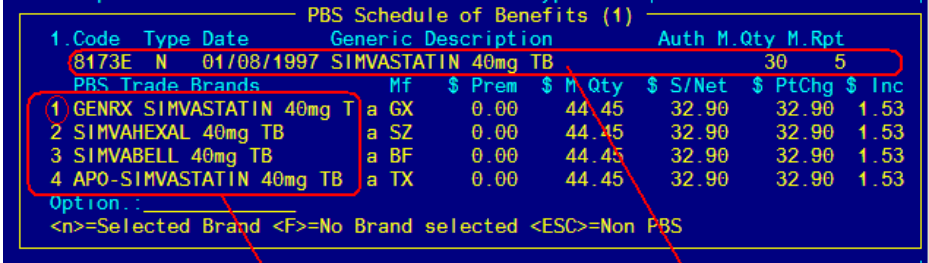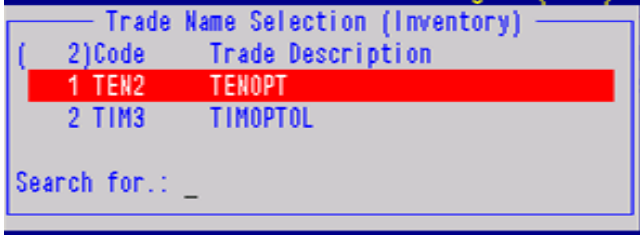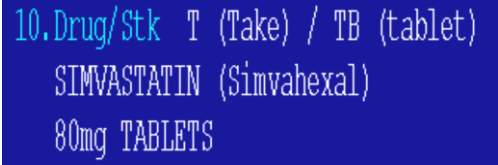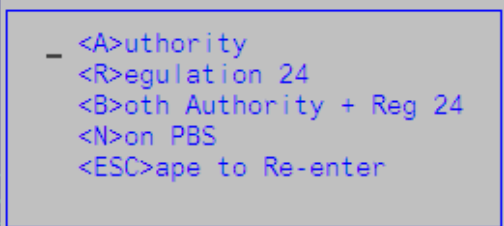
Dispensing a script is as simple as working your way through each field numerically. Pop-up windows may display along the way – select the appropriate option from the list. After the last field is populated, the cursor will end up at the options line. At the options line, you can re-edit any fields by entering the field number and pressing ENTER.

The following is an outline of all relevant fields in the dispense screen:

Field	Field Name	Action
Field 1	Pt = Patient	Enter patient surname (partial or full). This can be followed by part of the first name. Then press the Enter key. e.g. Smith,J *OR* Enter patient UR number – be sure to include prefix letters and any extra zeros e.g. OJ00012345 A patient list (maximum of 100 patients displayed) may appear if there are more than 1 matching name. Patients are listed with address, DOB and ward and admission date. Scroll down list to select patient and press <Enter>. *Note: All patients are imported directly via PMI/ATD interface.*
Window	Alerts	*If there are patient **Alerts** recorded for this patient then a window will pop up. Urgent notes such as ADRs and chemo file notes are displayed here*
Window	Notes	*The next screen is for general notes.*
Window	Entitlement update	This window only displays the first time the patient is selected in the dispense screen. If the patient has an entitlement card (concession, repat, Safety net) then Merlin prompts the user to 'accept' the number. This ensures the number provided from Meditech is accurate prior to dispensing. Type 'Y' to accept the number if it looks correct. This moves the number from PMI to PMIx screen. Once the number is accepted the first time this window will not pop up anymore.

Field	Field Name	Action
Window	History	Dispensing history will automatically pop open
Field 2	Pt Cat = Patient Category	Each Institution will have their own set of 'patient categories' (Refer to Section 7.1 Charging & Health Funds). For example: • A = Admission Related Drug (ARD) • N = Non Admission Related Drug (NARD) • D = Discharge • F = Fund approval This determines the billing based on patient's health fund.
Window	PBS Status	You will be prompted for the patient's concessional status, or *Payment Type*. The cursor will appear next to the patient's current concessional status. Press the Enter key on the defaulted status Payment type <G>eneral <C>oncessional <E>ntitlement <R>PBS <D>octors bag
Field 3	Ward = Inpatient Ward	This will automatically populate with the patient's current ward based on PMI/ATD. Press the Enter key to select this default. Another ward can be selected to override but a mismatch warning will appear. Type ? for list of alternative wards.
Window	Admission Number (Visit/ Episode)	If the patient has several bookings with the hospital in different areas, a drop-down menu will appear, displaying all admissions, their dates and visit/episode number - these may include future bookings (forward dated pre-admissions). You will be prompted to choose the correct admission for this dispensing. Check the dates and select an 'open' admission - always select a line with a valid admission number. ***It is critical that the dispensing is matched with the correct admission date and visit/episode number (both of which can be found on the patient sticker)*** Select a visit/episode for billing (2)Visit Type Adm.Date Dis.Date Location 1 61082 IP 22/09/2010 CCU 2 AD000784 I 16/10/2007 14/07/2010 GPHW005
Field 4	Clinic	Enter a valid clinic code or type ?for a list of clinic codes. The cursor will only move to this field if the patient category is set up as 'outpatient'.
Field 5	Rx No = Script Number	'+' will enter the next available prescription number. This default should always be chosen. The number sequence auto populates and is shared amongst other sites. The full Script Number is a combination of fields 5 and 6.
Field 6	It/Rp = Item & Repeat Number	'+' will enter the next available item and repeat the number. This default should always be chosen. If you have filed your first item but then need to edit this, you can enter the item number into this to recall the item i.e. 1/0, 2/0 or 3/0.

Field	Field Name	Action
Field 7	Dr = Doctor	Enter the prescribing doctor's surname, or part thereof. It is not necessary to type doctor name in full with correct spelling OR Type '#' followed by the doctor's prescriber number. Only doctors relevant to that site will be listed based on login.
Field 8	Rx Date = Script Date	Enter prescription date (can enter 0 for today's date)
Field 9	Type = Script Type	There are 2 options: • N = Normal • NO = Normal, Owing NB: N does not refer to NHS.
Field 10	Drug/Stk = Drug Item	Type in the drug to dispense. Drugs can be searched by: • Generic name; or • Brand name (Type '/' before the trade name); or • Merlin inventory code Choose the correct item, strength, form and quantity from the menu provided. *8 options are available for the search term "simva…"* *Only GENERIC drug names are listed at this stage* The number in brackets in the top left hand corner of this window indicates the number of items listed. Each page of the list can be quickly navigated using the ← and →arrows.
Window	PBS Look Up	The PBS Lookup screen may appear. Choose the item with the PBS code (left hand side) that matches the indication for the drug. Also check Type, Qty, Rpts and Auth requirements. If unknown refer to PBS Online.

Field	Field Name	Action
Window	Brand Selection	The **PBS Schedule of Benefits** screen (blue screen with a yellow border) will appear and show all items on the PBS under that PBS code. The PBS maximum qty and repeats are displayed in the top corner. Enter the number corresponding to the brand that is to be dispensed and press Enter to continue. *If the medication is ONLY Non PBS, then a similar screen to the above will appear (Grey Screen) - with much less detail*
Field 11	Directions	Enter the directions for administration. The respective verb and noun for the product are displayed adjacent to the drug (see Field 10). Sig codes can be used.
Field 12	Days = Days Supply	Defaults to 30 but override if required. This is not a mandatory field, however if set correctly, the entered value can be used to calculate the quantity for a non-PBS item.
Field 13	Qty = Quantity	The maximum PBS quantity will be automatically displayed. If the item is non-PBS, then Merlin will default to the pack size selected. Edit if required.
Field 14	Rpts = Repeats	The maximum PBS repeats will be automatically displayed. If the item is non-PBS, then Merlin will default to zero. Edit if required.
Window		If the quantity or repeats entered are greater than those allowable on the PBS, an information box will appear (as below). Choose the reason for the increase quantity/repeat. If Authority is chosen, it will prompt you for an authority number.

Field	Field Name	Action
Field 15	Lbl = Labels	Indicates the number of labels that will be printed based on Quantity selected. For multiple labels a second box will appear. Indicate here the quantities of stock required on each label.
Field 16	Bill = Bill to...	There are 3 options: Ward, Patient or Fund. This automatically populates based on patient category (field 2) and health fund in PatCat. but can be edited. Skips over but can be edited if required.
Field 17	Chg = charge price	The dollar amount that will be billed. Automatically calculates but can be overridden if required. Skips over but can be edited if required.
Field 18	Exp = Expiry Date	Expiry dates can be entered in this field. Skips over but can be edited if required. If entered it will appear on the label next to the barcode.
Field 19	BNo = Batch Number	Batch numbers can be entered in this field (for manufactured or repackaged products). Skips over but can be edited if required. If entered it may or may not appear on the label next to the barcode (depending on site setup). Note: the batch number is stored in Merlin if needed for future reference.
Field 20	Status	This is a separate window used for deleted scripts (see next section)
Field 21	Tax	This window is not to be used

P at the bottom of the screen finishes the dispensing and *prints* the label. *F* at the bottom of the screen *files* the dispensing temporarily whilst other dispensing can be carried out for the same patient if required. When the final item is being dispensed, *P* can be entered at the bottom of the screen and all labels will print.

5.7.2. Finalise a Script

Once all fields are complete, there are 2 commands that may be entered at the Option Line (bottom of the screen) to finalise a script.

- **P** will complete the transaction fully and PRINT the script label. The user is then prompted to start a new script from the beginning.
- **F** to FILE the script and continue other dispensing for the same patient if required with some fields pre-populated as per the previous script. The label is not printed until the last script is processed and **P** is selected which will print all queued scripts for that workstation.

> *When dispensing in not **Printed (P)** and the only **Filed (F)** the item remains 'Open' in the patient profile.*
> *This means the label has not printed and theoretically the stock has not left the pharmacy. Stock levels in Merlin will not be updated until the item is **Printed (P)**.*

In both cases - Enter **user ID** when prompted.

When the *Print* prompt is displayed, type *L* to print label, *R* to print a repeat or *N* to save all changes but not print (multiple commands may be entered)

For discharge patients the following will also print:
- patient address label with barcode
- patient invoice (separate screen also appears)

Once the item is labelled a Script/Scan/check process is done (see next section).

5.8.   Script Scan

The scan process must be done after the product is labelled with the dispense sticker; do not scan the product barcode until the sticker is attached. The script scan serves as a cross check process to match the product itself as well as the dispense label.

NB: Items cannot be scanned without first selecting a patient. Items can only be scanned in batches as per patient.

ZOOM: **SSS**

Field 1: Enter the **patient** for which the items are to be scanned. The patient name will default to the last patient used on that computer terminal. The patient can be entered into field 1 by either:
- Type in the surname, firstname (as per usual patient search rules); or
- Type in the UR number (if known); or
- Scan in the patient identifier barcode from the dispense label (if available)

Field 2: Type in the **script** number. This can be done by either:
- Scan the barcode on the dispense label (preferred method); or
- Type in the Merlin script number i.e. 1443/1/0

Field 3: Scan in the **product barcode on the pack**.
- If there is no barcode and/or the barcode is obscured then type in "**Z02" in** field 3 and the system will acknowledge this.

Field 4: As each item is scanned a message appears in the **Remarks** column to indicate the success of the scan. The drug description will also appear.

Repeat fields 2 and 3 until all items for that patient are scanned. Only scan items relevant to the patient listed in Field 1. (To scan items for another patient a new screen must be opened.)

When all items are scanned; **Type in your user ID** in the next available line (does not have to be at the Option line; screen does not have to be filed/saved)

```
───────────── Dispense - Script Scan (1) ─────────────

1:Pt..10020    TESTING, JUDY
DOB 25/06/1988  5 SMITH STREET TESTVILLE 3122
 2.Script        3.Pack            4.Remarks
 1 224/2/0        9323610000125      OK-METOCLOPRAMIDE 10mg TB (PRAMIN)
 2 _____
 3
 4
 5
```
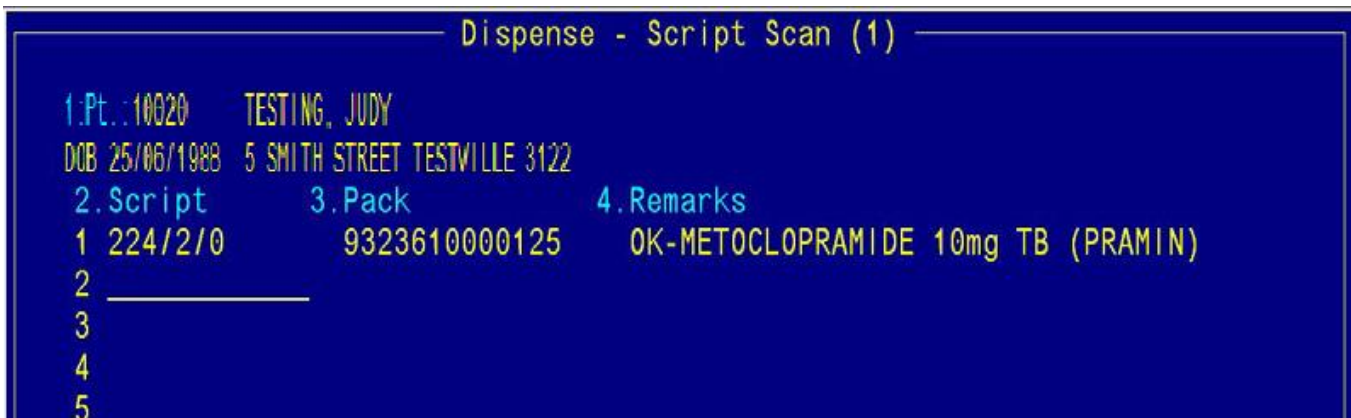
5.9.   Final Check

After the pharmacist has done a final check of the dispensed items, he/she will need to sign off that the prescription was 'final' checked by him/her.

ZOOM: **CCC**

Step 1: Select the patient using the usual patient search rules.

Step 2: In Field 2, each line will relate to a particular dispensed item, identified by the Script No. Type 'F' at the options line to check off prescription. You will be prompted to enter your operator code followed by a password.

The initials under the letters *Chkd* (right hand side) will now indicate the user who scan checked each item.

Note: This step will also change the operator code in the dispensing history to reflect the pharmacist who did the final check.

This screen is also useful when you need to check the Script Scan Check status of dispensed items.

5.10. Specialised Dispensing

5.10.1. Dispense PBS item as 'PRIVATE'

If dispensing a PBS item but you want to override it to private then this is done **at Field 10**. When the drug is selected (field 10) and the PBS brand window is displayed press the ESCAPE key to force the item into a private path. This will display the normal trade display window. Select the required brand from the list. The PBS status is displayed in the centre panel as 'Non PBS'.

To convert back to PBS then reselect the drug in field 10 - The PBS status is displayed in the centre panel as 'PBS' with an adjacent PBS code.

5.10.2. Dispense a PRIVATE item

If dispensing an item that is NOT PBS, in Field 10 type the drug to be selected. If there is more than 1 possible choice, an inventory master index window will be displayed (see below). Select the required drug from the list.

This will then display the normal trade display window. Select the required brand from the list. The PBS status is displayed in the centre panel as 'Non PBS'.

Trade Name Selection (Inventory)

MERLIN codes

PRIVATE dispensing so PBS information not included in menu
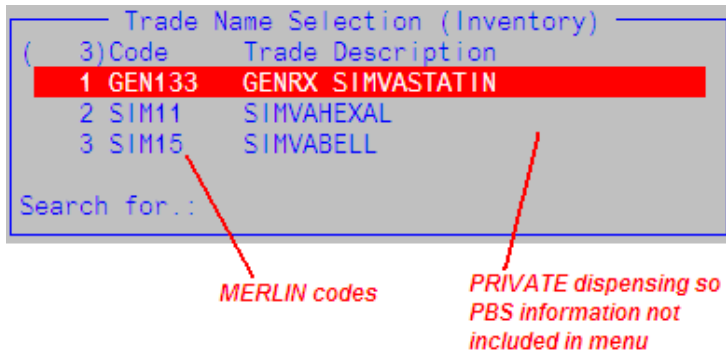
5.10.3. Dispense an Authority Item

ALWAYS check to ensure the paper prescription has one of the following:
- Phone Approval Number (eg. Z5321AC) or;
- Streamlined Authority Code (eg. 1234)

If the prescription is a **Streamlined Authority**, the Streamlined Code used MUST be checked against that which is detailed on PBS online for the same drug, quantity and number of repeats. To do this, search PBS online for the drug that is prescribed on the Authority prescription and check the details circled below.

Follow steps for standard dispensing until field 10 (Drug Selection)

When an authority item is selected in Field 10 another PBS window may appear to select the relevant PBS code. A grey Authority Window will always appear anytime an Authority item is selected (even if overriding to private). The authority number should either be:
- The Authority number as per prescription in hand
- Auto populated with an 11 digit number (specific sites only); or
- Enter '000000' to bypass the screen (Note: the script will have Authority number '000000'. This will be rejected by Medicare unless a valid Authority number is entered).
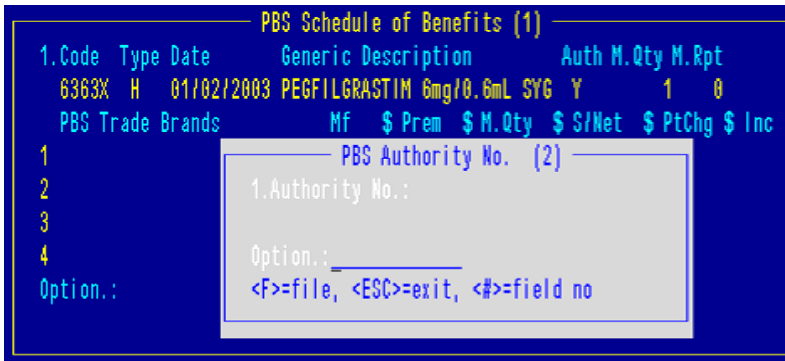
Press **F** to file the window.
Continue dispensing as per usual. Remember to make the item OWING if required ('NO' in field 9)

5.10.4. Dispense a Deferred Item

There are 2 methods for dispensing a Deferred Item. Any one of the method can be used.

Method 1:
Follow usual steps of Dispensing a Standard prescription - Stop at Field 14.
- In Field 14 **Rpts** type the number of repeats on the original prescription
- In Field 15 **Labs** (labels) type **D** (Deferred). The middle panel in the dispense screen will now display "Deferred".

Continue dispensing as per usual. Enter F or P at the bottom of the screen to complete the dispensing and print the repeat

---

Method 2:
Follow usual steps of Dispensing a Standard prescription - Stop at Field 6.
- At Field 6, enter either **'+/D'** or '**+U'** will giver you the following options
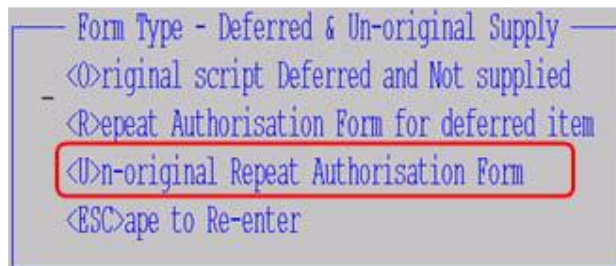
- Select <O>**Original Script deferred and Not supplied.** The middle panel in the dispense screen will now display "Deferred".

Continue dispensing as per usual. Enter F or P at the bottom of the screen to complete the dispensing and print the repeat.

5.10.5. Regulation 24 Dispensing

Follow usual steps of Dispensing a Standard prescription (Refer Section 11) - Stop at Field 13.

- In Field 13 (Qty) enter the total quantity to be supplied. As this will be greater than the PBS Quantity you will be prompted with a selection box to provide a reason for the increase.

```
_   <A>uthority
    <R>egulation 24
    <B>oth Authority + Reg 24
    <N>on PBS
    <ESC>ape to Re-enter
```
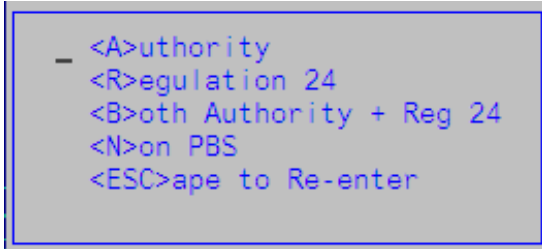
- Use the ↓ to select **<R>**egulation 24
- In Field 14 (Rpts) enter the number of repeats being supplied to obtain the total quantity, i.e. if the PBS quantity is usually 30 plus 1 repeat enter a quantity of 60 recording 1 repeat. Please note that no repeat authorisation form will print as all repeats are to be dispensed at once.

5.10.6. BLANK dispensing (Dispensing an item not listed in Merlin or has zero stock)

This process is to be used in the event that an item is to be dispensed but does not appear in the Merlin Product File. Always check the Merlin Product Master File (zoom **PRODUCT**) to confirm that the item is not already in the system. The item may be in the product file but just not 'extended' to your pharmacy Main Store as a stock record so it does not appear in the dispense look up screens. Contact the purchasing officer if this is the case.

Follow the usual steps of Dispensing a Standard Prescription - Stop at Field 10.

- In Field 10 Drug/Stk type the drug name, (brand name), strength, form and quantity this **must** be preceded by an apostrophe'.
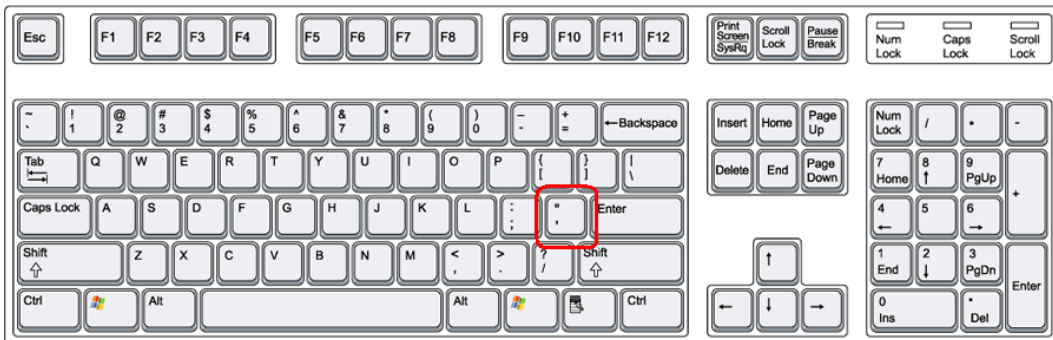
Type the above details in BLOCK CAPITALS for consistency i.e.
'ANYFLOXACILLIN (ANYFLOX) 500MG CAPS 28 or
'MICROPORE TAPE 1.25CM X 9.14M

```
10.Drug/Stk
    ANYFLOXACILLIN (ANYFLOX) 500MG
    CAPS 28
```

- Press **Escape** when prompted with the PBS Lookup

```
┌────────────────────── PBS Lookup ──────────────────────┐
│( 22)Code Type Date...... Generic Description....... Auth M.Qty M.Rpt│
│  1 13Q   N   01/01/1992 CREAM  CR                      100    1    │
│  2 15T   N   01/01/1992 THE EAR DROP  EAR               15    2    │
│  3 63H   N   01/01/1992 THE PASTE  PAS                   1    0    │
│                                                                    │
│Search for.:                                                        │
└────────────────────────────────────────────────────────┘
```

- In Field 11 **_Directions_** type the directions for use, as usual
- In Field 13 **_Qty_** enter the number of boxes/bottles/pack supplied (not number of tablets)
- In Field 17 **_Chg_** enter the authorised dollar amount for this product.
- Print a second label to attach to the BLANK dispensing clip board for later correction by the **Stock Coordinator or Administration Technician.**
- **If the product is later added to the Merlin Product File, then the original dispensing record will need to be edited i.e. Field 10 Drug/Stk of the dispensing record will need to be updated with the new product. Please ensure the Chg (Field 17) remains the same, to prevent messages being sent to Billing.**

5.10.7. Special DVA Scripts (RA)

This section describes how to process a specially approved item for DVA patients whereby a private item is claimable using an authority script.

There are two variations to the dispensing process when dispensing for Repat patients, when a non-NHS (not covered under the PBS or RPBS) is prescribed for a Repat patient using an RA (Repat. Authority) Script. The variation is dependent on whether or not the prescribed product is contained in Merlin's product file.

Scenario A: RA Prescribed Product is in Merlin's Product File

- Select the patient using the patient search rules, or entering the hospital UR number, as described above.
- When prompted for the patients PBS Status in the pop up window that appears after you have entered the patient category in Field 2 (Pt Cat), please ensure you <**R**>PBS.

```
┌──── Payment type ────┐
│   <G>eneral          │
│   <C>oncessional     │
│   <E>ntitlement      │
│   <R>PBS             │
│   <D>octors bag      │
└──────────────────────┘
```

- Continue to follow usual steps of dispensing a Standard prescription (Refer Section 11) - Stop at Field 10.
- In Field 10 **Drug/Stk** type in the name of the product using the usual drug search rules and press Enter. Non-NHS items will trigger the message "Is this a specially authorised DVA item (Y/N)?" to appear at the bottom at the screen. Type '**Y**' if an authority script has been received for the item (or if you are planning to request an authority from the doctor as an owing script).

```
┌─────────────── Message ───────────────┐
│  └─Is this a specially authorised DVA item (Y/N) ?  └──┘
```

- The valid RA Approval number must then be entered into the pop-up box. When this has been entered press **Enter** and then File to save – enter the authority if available or type "000000" if owing.


```
┌─────── PBS Authority No.  (2) ───────┐
│  1.Authority No.: 965842              │
│                                        │
│  Option.:_____                    │
│  <F>=file, <ESC>=exit, <#>=field no   │
```

- Proceed through Fields 11 and 12 in the usual manner.
- In Field 13 you will be asked to enter the quantity of the item as usual, however when you press Enter a message at the bottom of the screen displaying the AWP (Average Weighted Price) of the item. To accept this price; press Enter accept or **N** to change this value – this is usually not necessary. It is only necessary if the actual price is greater than twice the AWP.


```
Enter OPTION, <F1>=help....:
Average Weighted Price = $30.00 <N>=change  _____
```

- If **N** is pressed you will be asked to enter a price. You must not change the price unless authorised to do so.


```
Enter OPTION, <F1>=help....:
Price Election  = $ _____
```

- Proceed through the remaining fields as usual. Please ensure that Field 15 has the required number of labels then file as usual.
- Please note that the PBS Code of 0000 will appear in the Last Updated section of the screen, signalling that the item will be processed under the RPBS.


```
-- Last Updated --

New Item
S/Net : $5.60
M/care:

PBS  00000
```

Scenario B: RA Prescribed Product is <u>NOT</u> in Merlin's Product File

- Select the patient using the patient search rules, or entering the hospital UR number, as described above.
- When prompted for the patients PBS Status in the pop up window that appears after you have entered the patient category in Field 2 (Pt Cat), please ensure you select <R>PBS.
- Continue to follow usual steps of Dispensing a Standard prescription (Refer Section 11) - Stop at Field 10.
- In Field 10 *Drug/Stk* you must first use the apostrophe key <' > located to the left of the **Enter** and enter the full particulars of the item including generic name, (brand name), form, strength and (quantity) then press Enter. Please ensure these are entered in BLOCK CAPTIALS for consistency.

- The next pop-up to appear is the 'PBS Lookup' for compounded items; press **Escape** at this point.

- Then as described in Scenario A, the message "Is this a specially authorised DVA item (Y/N)?" will appear at the bottom at the screen. Press **Y** (yes) to accept, and then press **Enter**.
- The valid RA Approval number must then be entered into the pop-up box. When this has been entered press **Enter** and then **F**ile to save – enter the authority if available or type "000000" if owing.
- Proceed through Fields 11 and 12 in the usual manner.
- In Field 13 you will be asked to enter the quantity of the item as usual, however when you press Enter a message at the bottom of the screen displaying the AWP (Average Weighted Price) of the item. To accept this price; press Enter accept or **N** to change this value – this is usually not necessary.
- If **N** is pressed you will be asked to enter a price. You must not change the price unless authorised to do so.
- Proceed through the remaining fields as usual. Please ensure that Field 15 has the required number of labels then File as usual.
- Please note that the PBS Code of 0000 will appear in the Last Updated section of the screen, signalling that the item will be processed under the RPBS.

5.10.8. Dispense a Repeat (In-house)

- In Field 1 **Pt** of the dispensing screen:
  - Type **r** followed by the prescription number (in the format ###### / # / #) e.g. 123/1/0
    OR
  - Scan the barcode on the repeat.
- Ensure all details match those of the original prescription.
- Enter **P** at the bottom of the screen to complete the dispensing and *print* the label.
- Enter user ID when prompted.
- When the **Print** prompt is displayed, type **L** to print a label, **R** to print a repeat or **N** to save all changes but not print (multiple commands may be entered e.g. **lr**).

5.10.9. Dispense a Repeat (Issued from an External Pharmacy)

- Follow Steps 1-5 of Dispensing a standard prescription. Stop at Field 6.
- At Field 6 *It/Rp*, enter**+/U** or **+/D** to dispense an unoriginal prescription. This will display a new grey window.
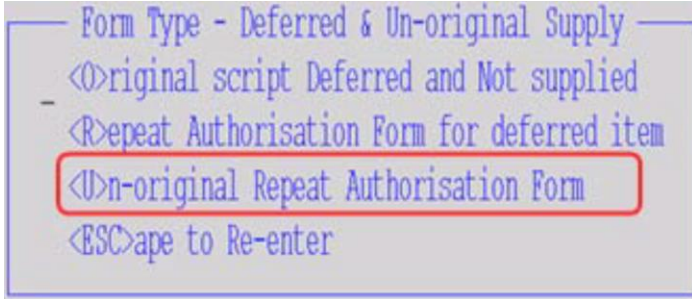
- Select **U** for a general unoriginal repeat. This will display a new blue window. Populate each field as prompted.
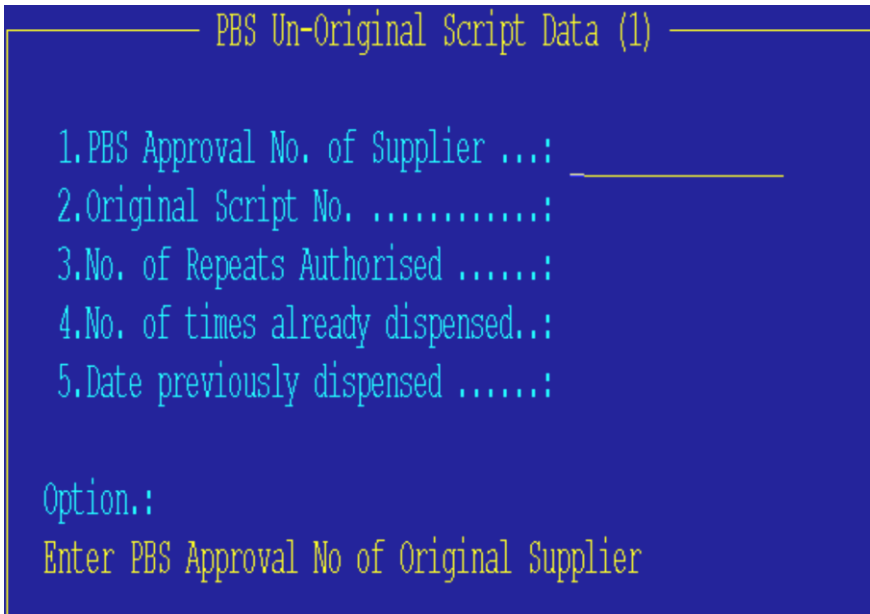
- When all details in the blue window are complete press F> at the Option Line to file the window.
- Continue dispensing as per usual. The remaining number of repeats will automatically update in Field 14.
- Enter **F** on the option line to file.

5.10.10. Script Harvesting

In order to identify scripts that have resulted from Script Harvesting, an asterisk must be placed in front of the Operator Code (User ID) when finalising a script. Refer to **Finalising a Script** above. For example the Operator code *ECO* or *ZSA* should be entered after typing **F** to finalise the script (or **P** to print the script).
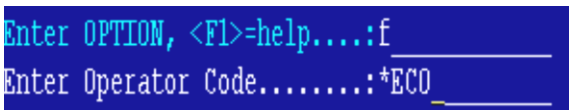
5.10.11. Manual/ Offline Dispensing

Merlin is reliant on an active network connection to communicate with the central server. In the event that there is a disruption to regular network service, the site Pharmacist may still dispense drugs manually (offline). This will require all labels to be handwritten. Please note that handwritten labels must comply with applicable state legislation. The details of all items dispensed manually/ offline must be recorded using the Emergency Dispensing Record Sheet. The form records the particulars below.

- Date
- Patient Name and UR
- Ward
- Doctor
- Drug (include generic/trade name, strength, form)
- Qty
- Directions
- P'cist

Once network access resumes and Merlin is accessible, all manually dispensed scripts must be retro entered into Merlin. Each line of the Emergency Dispensing Record Sheet should be signed off to confirm that retro entry has occurred.

5.11. Other Dispensing Functions

5.11.1. Edit a Script

- The first step to editing a script is to retrieve/display the relevant script in the Dispense Screen which can be done in 3 ways:
    - o BARCODE: In field 1 where it prompts for the Patient name scan the barcode on the dispense label; or
    - o SCRIPT NUMBER: In field 1 where it prompts for the Patient name: type in the prescription number in the full format (e.g. 3297/1/0); or
    - o TAG SCRIPT: Go to the patient history (Zoom=HX). Type in the line number of the item to be edited then press E> to tag it and **F** to file
- Once the script is displayed in the Dispense Screen, type the required field number at the Option Line (bottom of screen) and make the necessary changes to each field individually. Some fields you can click on to make the necessary changes.
- When editing is complete enter **F** to file or **P** to print new label or repeat form.
- Enter **User ID** when prompted.
- When the Print prompt is displayed, type L to print a label, R to print a repeat or N for no action (multiple commands may be entered – i.e. **lr**).

5.11.2. Delete/Terminate a Script

Terminating a dispensing removes it from the PBS claim, cancels any charging and reverses stock levels whilst still displaying it in the medication profile for future reference. This can be useful when crediting items or marking off owing prescriptions with Authority script or repeats, when the original details of the dispensing needs to be left in the profile.

Deleting a dispensing should never be done routinely as all dispensing information should be kept for reference purposes. However, it may be necessary when items are dispensed incorrectly to the wrong patient and it should never have been added to that patient's medication profile.

- Enter into the Script as if to Edit
- At the Option Line enter into Field 20 ***Status***. This will open a new grey window to enter further details.
- In the grey status window:
  - Go to Field 1 to change status for C (complete) to either **T** (Terminated) or **D** (Deleted). Do not use any other options from the menu.
  - In Field 2 '*Reason for'*, enter a brief explanation as to why the item is deleted or terminated (free text) e.g. item returned, full qty returned for credit.
  - Type F to File the window
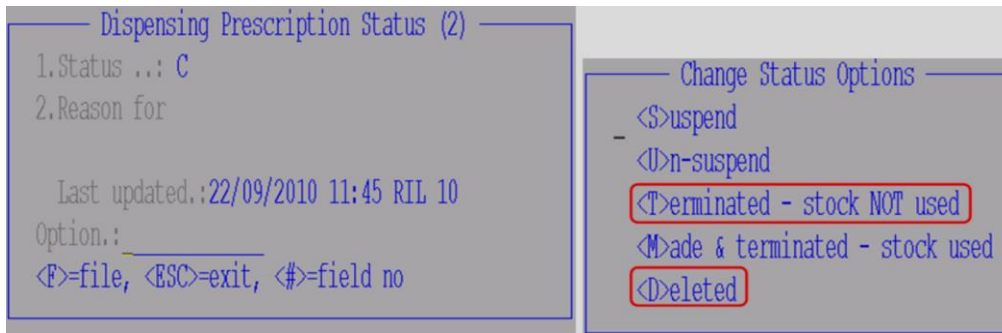
- File or Print the Script in the main dispense screen at per usual
- Enter user ID when prompted.

*The medication profile will display the dispensing as **Term'd** as shown below. Deletions will never be displayed.*

5.11.3. Reprint Labels and Repeats

- Enter the Script as if to Edit.
- At the bottom of the screen enter **P**
- Enter **User ID** when prompted
- When the Print prompt is displayed, type L to print a label, R to print a repeat or N for no action (multiple commands may be entered – i.e. **lr**).

5.11.4. Display all available repeats

• When in the patient's medication profile, type **RPT** at the Options line.

5.11.5. Re-label dispensed stock (from another pharmacy)

• Follow steps 1-9 of *Dispensing a prescription*
• In Field 9 *Type* enter **N** (i.e. not on owing)
• In Field 10 *Drug/Stk,* select the product as per step 12 of *Dispensing a prescription,* however dispense as PRIVATE (i.e. Non-PBS)
• In Field 11 *Directions* enter the updated directions then type **REL** at the end (this is the sig for **(Relabelled Medication)**)
• In Field 13 *Qty* enter 0
• In Field 14 *Rpts* enter 0
• In Field 15 *Labs* enter the number of labels required
• The price should default to $0.00.
• At the bottom of the screen enter **P**
• Enter **User ID** when prompted
• When the **Print** prompt is displayed, type **L** to print a label.

6. Dispense Reports & Printouts

6.1. Invoice of Patient Charges

- ZOOM: **PATINV**
- Select a patient using the usual patient search rules or press **Enter** to accept the pre-populated UR number (this will usually be the last patients transacted against)
- Field 3 (*Patient Cat*): leave this field blank to get all transaction categories (Admission, Non Admission, Discharge and Fund Approval)
- Field 4 (*Bill To*): Select **Patient** charge (due to the above selection this will mean that the invoice will show all patient charges, regardless of the category they were dispensed under)

```
┌─ Bill To ─┐
│    Patient │
│ _  Fund    │
└────────────┘
```

- Field 5 and 6 (From and To Dates): These are optional, if left blank it will show all charges for the patient, regardless of their episode number
- Field 7: Select **D** for detailed report
- Press **F** to file and print

```
┌──────── Date Range - Debtors Transaction Statement (1) ────────┐
│                                                                 │
│   Produce Patient Invoice Statement(s) for selected date range  │
│                                                                 │
│   1.Debtor ............: 10087                                   │
│     Name ..............: NGUYEN, HAI                             │
│                                                                 │
│   3.Patient Cat........:                                        │
│   4.Bill To...........: Patient                                 │
│                                                                 │
│   5.From Date.........: 20/12/2012                              │
│   6.To Date...........: 18/02/2013                              │
│                                                                 │
│   7.Detail or Summary..: D                                      │
│                                                                 │
│   Option.:f_____                                           │
│   <F>=file, <ESC>=exit, </D>=delete, <#>=field no               │
└─────────────────────────────────────────────────────────────────┘
```
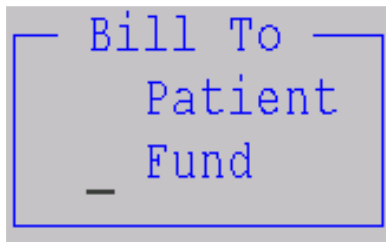
6.2. Invoice of Fund Charges

- ZOOM: **PATINV**
- Select a patient using the usual patient search rules or press **Enter** to accept the pre-populated UR number (this will usually be the last patients transacted against)
- Field 3 (*Patient Cat*): leave this field blank to get all transaction categories (Admission, Non Admission, Discharge and Fund Approval)
- Field 4 (*Bill To*): Select **Fund** charge (due to the above selection this will mean that the invoice will show all patient charges, regardless of the category they were dispensed under)
- Field 5 and 6 (From and To Dates): These are optional, if left blank it will show all charges for the patient, regardless of their episode number
- Field 7: Select **D** for detailed report
- Press **F** to file and print

```
────── Date Range - Debtors Transaction Statement (1) ──────

   Produce Patient Invoice Statement(s) for selected date range

 1.Debtor ............: 10087
   Name ..............: NGUYEN, HAI

 3.Patient Cat........:
 4.Bill To...........: Fund

 5.From Date..........: 20/12/2012
 6.To Date............: 18/02/2013

 7.Detail or Summary..: D

Option.:_____
<F>=file, <ESC>=exit, </D>=delete, <#>=field no
```

6.3. Print a Prescription Record Form (PRF)

- ZOOM: **PRF**
- Select patient or press **Enter** on the existing patient number.
- Field 3 **PRF Year** will display the current year
- Enter **Y** in Field 4 **Aggregate** to automatically include any other spouses or dependants with the same Medicare number
- Enter **N** in Field 5 **Include Non-PBS** so that no private items are included in the PRF. Note: For public hospital, Enter **Y** in field 5 to include non-PBS items.
- **F** to file
- **P** to print
- **Enter** on default printer

```
────── Prescription Record Form Print (1) ──────
 1:Pt.: 10087     NGUYEN, HAI
                  1 TEST ST
                  TESTVILLE 3000
                  DOB 31/03/1982

 3.PRF Year : 2013          Medicare..: 254377666
 4.Aggregate.: N

 5.Include Non PBS ..: N


Option.:f_____
<F>=file, <ESC>=exit, <#>=field no
```

6.4.   Print a Section 87 PBS Medicare Receipt

Patients who have been charged the incorrect price because their concessional details have not been accurate at the time of dispensing will need to present this receipt to Medicare for their refund.

- In the Patient History screen (ZOOM: **PROF**) select the patient using the usual patient search rules
- **Tag** the first item than needs to be included on the receipt and press **Enter**
- Press **E** then **Enter** again when prompted with the message below

```
                                ── Message ──
   ──List-  <R>epeat  <C>opy  <E>dit  <D>elete  <RTN>=other  <ESC>=exit ──
```

- Repeat the two steps above until all items required on the receipt are tagged and press **Enter**
- Type **M** for menu at the Option line then press **Enter**

```
<M>enu for other options
```

- Arrow down to **RPM** *Receipt S.87 PBS Medicare* and press **Enter**

```
        ── Option Line Selection ──
    <P>      Patient Profile  Printout
    <TAX>    Tax Record Printout
    <SELF>   Self Medication Chart
    <TIME>   Time Medication Chart
    <CHART>  Medication Chart
    <AGED>   Interim Medication Admin Chart
    <DAC>    Dosett Label
   _<RPM>    Receipt S.87 PBS Medicare
    <RFM>    Official Pharmacy Receipt
    <RPT>    Filter for scripts with rpts
    <OWE>    Filter for scripts owing
```

- Enter **P** for print when prompted.

6.5.   Print a Patient Tax Record

> *These records are used by the patient to show the taxation department the amount spent on prescriptions in a financial year.*

- In the Patient History screen (ZOOM: **PROF**) select the patient using the usual patient search rules
- Type **M** for menu then **Enter.**

```
┌─────────── Option Line Selection ───────────┐
   <P>      Patient Profile  Printout
   <TAX>    Tax Record Printout
   <SELF>   Self Medication Chart
   <TIME>   Time Medication Chart
   <CHART>  Medication Chart
   <AGED>   Interim Medication Admin Chart
   <DAC>    Dosett Label
_  <RPM>    Receipt S.87 PBS Medicare
   <RFM>    Official Pharmacy Receipt
   <RPT>    Filter for scripts with rpts
   <OWE>    Filter for scripts owing
```

- Arrow down to **TAX** *Tax Record Printout* and Enter.

```
┌──────── Patient Tax Information Printout (2) ────────┐

  1.Patient URNO ..: 10087
    Patient Name ..: NGUYEN          HAI


  2.Date FROM .....: 01/07/2012
  3.Date TO .......: 30/06/2013
  Option.:_____
  <F>=file, <ESC>=exit, </D>=delete, <#>=field no
```

- In **Field 2** and **3,** enter date range.
- Enter **P** for print when prompted.

6.6.   Create a Discharge Medication Summary

- In the patient profile **Tag** all the items that you want included in the discharge summary.
- Enter the number of the first dispensing you want on the list and press **Enter**.
- Enter **E** for edit and then **Enter**.
- Tag any other dispensing that is required by typing in the number and pressing **Enter**.
- Type **CHART** at the Option line and press **Enter.**
- The below screen is displayed.

```
1.Patient URNO ..: 10087        2.From Date...:19/02/2013
  Patient Name ..: NGUYEN       HAI


3.Drug              4.Directions 5.7-9 6.11-1 7.4-6 8.8-10  Script
1 PARACETAMOL 500mg TA> Take tablet >                     24343/2/0
2 METRONIDAZOLE 400mg > Take ONE tab>                     24343/1/0
3 AMOXYCILLIN 500mg CA> Take ONE cap>                     24342/1/0
4
```

- In Fields 5, 6, 7 and 8 enter the number of tablets to be taken at each time interval daily.
- At the bottom of the screen enter **F** to open the Word document with the completed discharge
- A word document window appears, displaying a Discharge Medication Summary.
- Edit document as required.
- Click the print icon in Microsoft word. The document will print to the printer set up in Windows.

7. Owing Scripts Management

7.1. Display all Owing Prescriptions

When in the patient's medication profile, type **OWE** at the bottom of the screen. This will display all outstanding owing scripts for that patient.

7.2. Owing Script Report

An Owing Script Report can be printed at any time.

Dispense → 6. Reports → Script Owing Report

7.3.   Mark off General Script

> *If the script date is 7 days after supply, then the script must be terminated (DO NOT Delete) and re-dispensed as per usual.*
> ***All dispensed items that are to be terminated MUST be taken off owing beforehand. If not, the owing prescription will still print and therefore be sent to the prescribing doctor for signing.***

- Find the patient in the dispensing menu (See steps 1-3 in ***Dispensing a Prescription)***
- Enter through to the patient's dispensing history and hide all dispensing that are not on owing (See ***Display all Owing Prescriptions)***
- Find the earliest owing for that particular item and **Tag** it by entering at the bottom of the screen the number on the far left, then **Enter**.
- Enter **E** for edit and then **Enter** again.
- Ensure all details on the prescription correspond with those on the screen (eg. Qty, product, **doctor** (especially for an outside doctor), date, repeats etc)
- In Field 9 ***Type,*** enter **N** (i.e. omit the **O**)
- Enter **P** at the bottom of the screen to save the changes and print the new label.
- Enter **L** to print a label and **R** if repeats are required to print as well.
- Place the claim label on the prescription and attach repeats if necessary.

7.4.   Mark off Authority Script (including HSD and Streamlined Authority Prescriptions)

> *If the script date is 7 days after supply, then the script must be terminated (DO NOT Delete) and re-dispensed as per usual.*
> ***All dispensed items that are to be terminated MUST be taken off owing beforehand. If not, the owing prescription will still print and therefore be sent to the prescribing doctor for signing***
>
> Ensure the Authority Prescription meets the PBS requirements.

- Follow process for marking off general script.
  - Take note of the quantity already provided and supply remaining balance, as well as the brand name originally dispensed (write these down before moving on).
  - In Field 9 ***Type,*** enter **N** (i.e. omit the **O**)
  - Enter **L** to print a label and **R** if repeats are required to print as well.
- Add free text patient note if required.

7.5.   Use Repeats to mark off Owing items

> ***ALL OWING SCRIPTS MUST BE TERMINATED AND REDISPENSED if a repeat is used to mark off an owing item.***

- Terminate the owing script first (do no delete) and change the script status from **NO** to **N** (field 9 of the Dispense screen). Take not of quantity already provided and supply remaining balance.
- Dispense the repeat prescription as per usual.
- Add free text patient note if required.

7.6. OWEBATCH process

Merlin has the ability to handle all owing scripts in the same screen using the **OWEBATCH** zoom. This is a special process whereby a 'batch' is run on a regular basis (e.g. weekly) to capture all owing scripts. These can then be actioned according to the doctors' preferred method of handling owing scripts as indicated in the Doctor File (ZOOM: **DOC**– field 16)

```
┌──────── Doctors - Pharmacy Dispensing (incl. external) (1) ────────┐
 1:Dr Code..:8015648         10.PBS No:8015648      18.Filter Codes:
 2.Surname..:Saturday        11.Pres. Type..:M       1 001    MAIN HOS
 3.Given....:David           12.Dental......:N        2 SHS01
 4.Address 1:1 Test Street   13.Optometrist.:N        3
 5.Address 2:Doctorsville    14.Tel:9645-6300
 6.Sub/State:Qld             15.Specialty:          16.RxOwe Method:O
 7.Post Code:4066            17.Email:bdonaldson@pharmhos.com
 8.Title:Dr     9.Cred.:MBBS 19<Teledex  >        20<Warrants & IDs>
 Option.:_____
 <F>=file, <ESC>=exit, </D>=delete, <#>=field no
```

```
┌── Send Method ──┐
  <E>mail
  <P>rinted Rx
  <F>axStream
  <O>wing Report
  <N>o output
```

7.7. Owing Script Transmission to Doctors (Web Portal/Auto Fax)

A secure web portal is available for doctors to use to retrieve and print their owing scripts dispensed in Merlin (similar to eClinic program). The same process can also be used to transmit scripts to doctors via Auto fax.

For the system to work the RxOwe method must be flagged in the Merlin doctor file as either:
- **<E>**- Web portal in the doctor file with a valid email address. Note: a valid email must be entered in [doc Field 17.
- **<F>**- Fax Streaming the doctor file with a valid fax number.

> ZOOM = **OWEBATCH**
>
> **To send the scripts to doctors via Web portal or Auto Fax:**
> - **Field 1:** Enter Site ID (Main Store). This may default to the last one used.
> - **Field 2:** The + symbol appears - Type Enter to accept the next batch sequence number. Take note of this batch number
> - **Fields 3 and 4:** Enter start and end date. This will capture any owing scripts that were dispensed in that period.
> - **Field 5:** leave blank (press Enter to skip)
> - **Field 6:** select **<S>**for script details view. Other views can be used if desired.
> - **Field 7:** Authority Filter – select **N** for No filter. Other filters can be used if desired.
> - **Field 8:** you can select a specific list of doctors (by prescriber number). If left blank it will include all doctors for whom Web flag or Fax is allocated.
> - Type **Enter** and the list of scripts and doctors will appear.

*NB: Scripts can be edited from here (e.g. to change script date) by typing **<E>**followed by the item number in the list (not the script number) e.g. e4 to edit line number 4. Scripts can also be removed from the screen if required by typing in **<10>**followed by the minus symbol and the item number in the list (not the script number) e.g. 10-4 to delete line number 4.*

```
 1:Site Id...:PH01      PHARMACY - MAIN STORE
 2:Batch.....:89         5.Pt Cat. 6.View:S    8.Drs:               15.New Prescriber:
 3.Start Date:12/09/2012            7.Auth:N
 4.End Date..:20/12/2012
10.Dr Id  Doctor Name   Patient Name   MerlinRx      Date Medication          Qty Ty Owe 11.Hold  Send  Status
 1 3336661 SMITH George  FAKE, Pierre   24252/1/0   28/09/2012 CARBAMAZEPINE (TEGRETO>  200  N Y              F
 2 3336661 SMITH George  FAKE, Pierre   24253/1/0   28/09/2012 WATER FOR INJECTION (P>   50  P Y              F
 3
 4
 5
 6
 7
 8
 9
10
11
12
_____

Enter OPTION, <F1>=help....:_____            (PHF.DISP.OWERX,M)
<F>=file, <ESC>=exit, </D>=delete, <#>=field no
<E#>=edit script | <P>=Print full batch | <W>=Web-link email | <FAX>=FaxStream email | <O>=Owing reports
```

To transmit scripts to the doctor:
At the option line type:
• **W** to send the Web portal scripts – this will trigger an email to the doctor with a link; *or*
• **FAX** to send the Auto fax scripts – this will automatically fax the owing notes to the doctor's nominated fax number (as per doctor file)

Press **F** to file the batch and take note of the batch number for future reference.

7.8.   Print Owing Scripts

Merlin has the capacity to print scripts directly onto script paper.
For the system to work the RxOwe method must be flagged in the Merlin doctor file as:
P - Print Scripts

```
┌─── Send Method ───┐
│   <E>mail          │
│   <P>rinted Rx     │
│   <F>axStream      │
│   <O>wing Report   │
│   <N>o output      │
└────────────────────┘
```

Even if the doctor flag is set to print scripts, authority items will still print as an 'Owing Reminder Note' on normal paper. For the system to print Authority Scripts on script paper the site must be pre-configured (contact PharmHos).

To Print Scripts from Merlin:
NB: before commencing this process remember to load the script paper as follows: Script paper in bottom tray; Normal Paper in Top tray (A5 repeats). Reset printer configurations.

ZOOM = **OWEBATCH**
- **Follow all steps as above**
- At the option line press **P** to print scripts.
- Type **F** to file the batch and take note of the batch number for future reference.
- Check and forward scripts to doctors for signing as per usual.

7.9.   Print Owing Reminder Notes

For the system to work the RxOwe method must be flagged in the Merlin doctor file as:
<O>- Owing Reminder Note
NB: Owing Reminder Notes can also be printed as per usual using the Owing Script Report function (refer section 7.13.2– Owing Script Report above)

To print owing Reminder Noted from Merlin:

ZOOM = **OWEBATCH**
- **Follow all steps as above**
- At the option line type: **<O>**to print reminder notes.
- Type **F** to file the batch and take note of the batch number for future reference.
- Check and forward notes to doctors as per usual.

7.10.   Printing an Owing Reminder (Copy of Prescription from Dispense Screen)

After a prescription has been filed (or printed) a copy of the prescription may be quickly printed from the dispense screen.
- In order to print this copy, edit a filed (or printed script) and type **CP** at the option line. This will print out on the laser printer on a standard sheet of A4 paper.

8. Pack Labels and Address Labels

8.1. Print Patient Label

- **Dispense → 2. Patient Information →10. Patients - Label- Ward/Address**
- Enter **patient surname** in full followed by a comma then first name (does not need to be in full), **Enter**
- Select the patient from the drop down menu
- Enter in a second patient, or **Enter** on a blank line to return to the bottom of the screen.
- Enter **F** at the bottom of the screen to file.
- Enter **Y** to print.

```
┌──────────── Patients - Label - Ward/Address (0) ────────────┐
│                                                             │
│ 1.Patient                              Ward                 │
│ 1 10087         NGUYEN, HAI            CCU,2,2              │
│                 1 TEST ST TESTVILLE 3000                   │
│ 2 123456        MORRISON, SCOTT        CCU,1,2              │
│                 C/- Pharmhos Software 63-85 Turner Stre>   │
│ 3  _____         │
│                                                             │
│ 4                                                           │
│                                                             │
│ 5                                                           │
│                                                             │
│ 6                                                           │
│                                                             │
│                                                             │
│ Option.:                                                    │
│ Enter UR No. / <?>=Look-up / pri<V>ate pt entry / <C>urrent pt. │
└─────────────────────────────────────────────────────────────┘
```
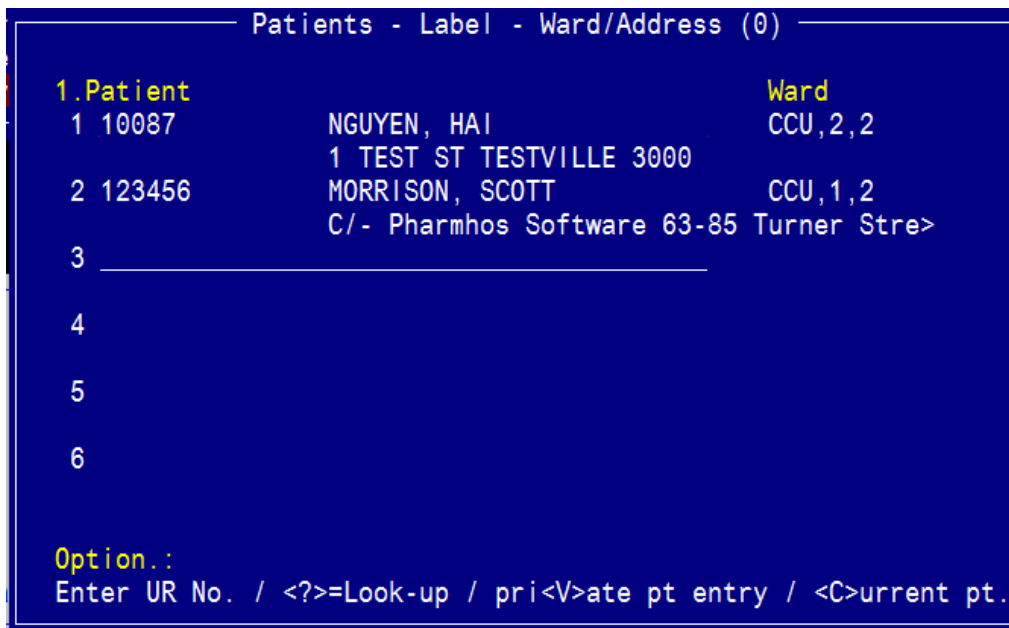
8.2. Create a New Pack Label

- In any field type **[LBL**
- Or **Dispense → 4. Label Printer**
- In Field I *Label Code*, type ? then search for a pack label

```
┌───────────── Label Printer Lookup ─────────────┐
│ (  2)Label          Label Description           │
│   1 AMOX250C        AMOXYCILLIN 250MG CAPS (W   │
│   2 AMOX            AMOXYCILLIN 250MG CAPS (W   │
│                                                 │
│                                                 │
│                                                 │
│                                                 │
│                                                 │
│                                                 │
│ Search for.:                                    │
└─────────────────────────────────────────────────┘
```
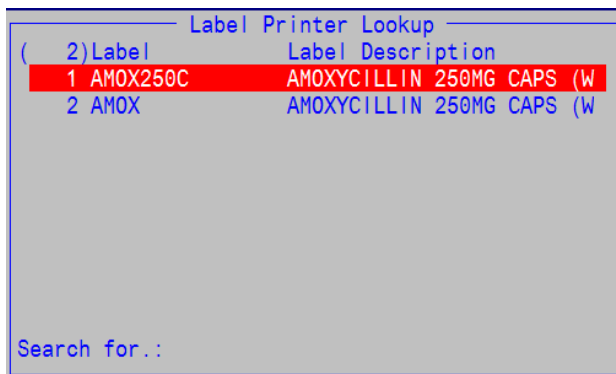
- If this label does not exist, you will be prompted to 'Create New Record?'. Press Y to accept.

- The system will then skip over other field and go directly to the white (text entry) box (Field 5 *Label Details*). Input the required text for the label and continue to press Enter, which will push you through a white box on the right hand side of the screen, until you reach Field 7.
- In Field 7 *Labels to Print*: Labels to Print enter the number of labels usually required.
- In Field 8: Barcode leave this field blank as this functionality is not used. Press Enter and this will take you to the option line.
- Navigate to Field 2*Description*: Description and type in the description of the label.
- Press Enter to navigate back tot the option line and press F to update and save.

```
┌──────────────────── Label Printer ──────────────────────┐
  1:Label Code ..: ALLO3              3<Default Settings >
  2.Description .: Allopurinol 100mg 10 Tab   4<Optional Margins >
  5<Label Details> 1 across x 1 down   6<Print Control    >
 ┌──────────────────────────────┐  ┌──────────────────┐
 1│       PRESCRIPTION MEDICINE  │  1│                  │
 2│                              │  2│                  │
 3│          ALLOPURINOL         │  3│                  │
 4│            100mg             │  4│                  │
 5│            VALLO             │  5│                  │
 6│                              │  6│                  │
 7│ B/No:<>_____│  7│                  │
 8│ Exp.:<>    Qty: 10 Tablets   │  8│                  │
 9│                              │  9│                  │
 └──────────────────────────────┘  └──────────────────┘


  7.Labels to Print ...: 1        8.Barcode ...: ALLO3

Enter OPTION, <F1>=help....:_____   <\> to clear      (PHF.LABEL,M)
Enter a short code for this label.
```

8.3.   Print Existing Pack labels

- In any Field type **[LBL**
- In Field 1*Label Code,* type the label code or description of the required label.
- In Field 7 *Labels to Print,* enter the number of labels required.
- At the Options line, type **P** followed by ENTER to print the label.
- Type **Y** when prompted to print.
- Note: To print multiple labels, navigate to Filed 7 and change the number to the desired quantity.

8.4.   Edit Existing Pack Labels

- **ZOOM: LBL**
- In Field 1: Label Code enter the name of the desired label. Use the arrow keys to select the required label and press Enter.
- Press 5 at the option line to navigate the text entry box. Use the arrow keys to move to the text which needs to be amended and delete or re enter as appropriate. For example you may wish to enter or edit a Batch Number or Expiry Date.
- Press Enter repeatedly until you arrive back at the option line and press F to update and save.

8.5.   Delete Existing Pack Labels

- **ZOOM: LBL**
- In Field 1: Label Code Enter the name of the desired label. Use the arrow keys to select the required label and press Enter.
- Type /D (forward slash and d) followed by Enter at the option line to delete the record from view.

9.   Stock Related Issues

All content covered in this section is also included in the Merlin Quick Reference Guide – Inventory. The content is a quick 'how to' guide for pharmacy staff operating in the dispensary

9.1.   Ward Ad-hoc Orders

There are 2 options when supplying 'ad hoc' stock to the ward:
1.   Unplanned issues
2.   Requisition by picking Slip
Check with you institution on their preferred method.

9.2.   Unplanned Issues

This process is used when stock is issued from the pharmacy which may be under the following circumstances:
- Imprest supplied on an 'ad hoc' basis at other times according to the ward's requirements i.e. ward transfer. This is referred to in Merlin as an 'Unplanned Issue' where items are supplied from the pharmacy to the ward when required.
    Note: Some institutions (namely public hospitals) prefer to issue 'ad hoc' requests for stock using the Requisition method. (Refer to Section 7.15.2: Imprest Requisitions (Picking Slips)

- INVENTORY--> 5. Transaction Processing -->Enter supply site-->Option 6 Unplanned Issue – Multi
- Step 1: Enter Supply site code (i.e. dispensary) – or type **?**to display look up menu
- Step 2: Enter Imprest site code– or type **?** to display look up menu.
- Step 3: Enter your **User ID.**
- Step 4: **Enter** through Field 4 **Remarks** without making any notes.

```
                    ─── Unplanned Issues - Multi ───
1:Supp. Site : PH01    PHARMACY - MAIN STORE        3.User Id : HAI
2.Order Site : CCU     CORONARY CARE UNIT      L2220  Hai Nguyen
4.Remarks ...: ASAP                                           Issue    Qty
5 Inv Code Generic Description Strength/Form    Pack   6.Trade Brand      7. Tax  8 Ms  9 Req
1 AMOX4   AMOXYCILLIN       250mg/5mL (100mL) SU BOTT(1)  CIL2  CILAMOX            I      2
2
3
4
5
6
7
8

   AMOXYCILLIN,250mg/5mL (100mL) SUSPENSION
                              Qty Avail .:     5.0000
                              Iss Cost ..:     1.59
                              Status ....:     NORMAL
                              Suppl Pack.:     BTTLE(1)

Enter OPTION, <F1>=help....:f_____        (ICT.STKUISS,A)
<F>=update, <#>=field no, <ESC>=exit
```

Labels on the screen:
- **Enter Inventory code OR Drug Search OR scan product**
- **Description automatically appears**
- **Type ? to view list of Trade brands & select preferred brand (if in stock)**
- **Specify Unit of Measure: I = Pack (default)**
- **Enter Quantity**

- Step 5: Enter required drug (see section 3.3 - Drug Search Rules) in Field 5, Line 1
  OR – scan barcode on item pack if available
- Step 6: Specify Trade brand in Field 6 – type **?** to view available trade brands in preferred ranking order
- Step 7: Field 7 shows whether you are issuing the stock in units **(U)** or issue packs **(I).** Leave the default as **(I)** unless you are issuing less than the standard pack size (e.g. 3 amps from pack of 5)
- Step 8: Enter **Quantity** in Field 8, Line1
  - (If more items to be supplied: Press **Enter** and repeat steps 5 - 7 on line 2 etc.)
- Step 9: Press **Enter** to jump to Option Line on bottom of screen
- Step10: Type "**F** " to finalise the transaction; Type "Y" to red message "Confirm OK to File"
  - Items will be charged to designated ward.
- An Issue Reference Number is automatically generated and appears at the bottom of the screen.


```
              ─── Select Print Option ───
   CHOOSE OUTPUT from one of the following:                  00
   The print Q is set for..:DEFAULT, PHARMACY, WP            30
   Enter <P>rint, <D>isplay, <S>ave, <ESC>=exit..: _____     AL
                                                             5)
```

Labels:
- *Type P to print the distribution report*
- *Issue Reference Number*

```
Enter OPTION, <F1>=help....:Issue Ref. number = 4
```

- Type **P** to print (allow printer default settings).
- An 'Unplanned Issues Report' will print from Merlin to confirm transaction and indicate a reference number.

Error Messages for 'Unplanned Issues':

This error message appears to alert the user that the item issued is not normally kept on that ward's imprest list. The user must type " **Y** " to confirm stock issue.

This error message appears if there is no Stock on Hand (SOH) so the system cannot allow any stock to be issued out. The user cannot bypass this screen – **notify Procurement Team Leader immediately to adjust SOH so order can be processed**

The pharmacy staff uses the Unplanned Issues Report to pick stock from the Pharmacy Main Store and gather them together for the ward. If the quantity specified on the requisition order is greater than the stock on hand in the pharmacy store, determine the quantity to be supplied to the ward and note the quantity supplied for that item on the Report – this quantity will later need to be adjusted in Merlin.

9.3.   Requisition by Picking Slip

Note: Some institutions (namely public hospitals) prefer to issue 'ad hoc' requests for stock using the Requisition method. Refer to the next section 6.3.4.1: Create a Requisition order (manual).

How to create a Requisition order:

INVENTORY → 4.Stock Requisitions → 1.Stock Requisition Entry
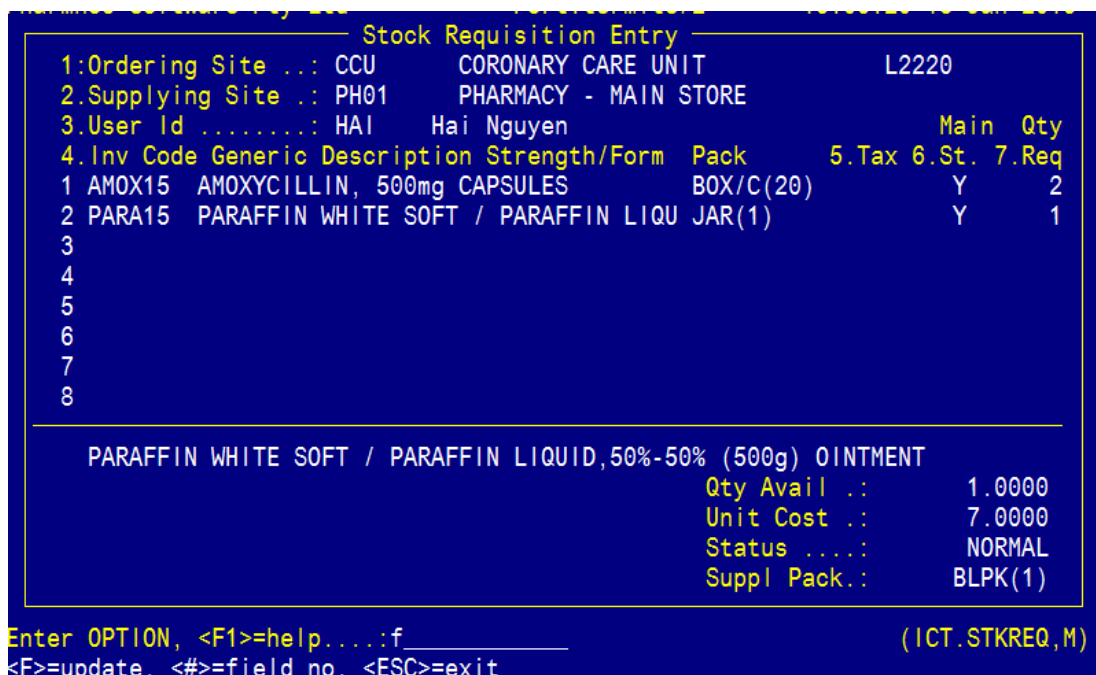
- Step 1: Field 1 - Type in the Ordering Site Code.
- Step 2: Field 2 - Type in the Site Code. This may already appear on the screen by default.
- Step 3: Field 3 - Enter your User ID.
- Step 4: Field 4 - Enter inventory code(s) or inventory description or type"/" followed by a trade name description. This is a multivalued field.
- Step 5: Field 6 – Specify if stock is to come out of the main store. The default value should be yes.
- Step 6: Field 7 – Specify the quantities to be supplied to the order site.

- Step 7: At the option line, type "**F**" to file
- Step 8: A red message appears at the bottom of the screen – press **Y** > to confirm the transaction. To attach a message to the requisition picking slip, type 'L' and enter message.

The requisition order will print out as a picking slip.

The pharmacy staff uses the Requisition picking slip to pick stock from the Pharmacy Main Store and gather them together for the ward. If the quantity specified on the requisitions order is greater than the stock on hand in the pharmacy store, determine the quantity to be supplied to the ward and note the quantity supplied for that item on the requisition order – this quantity will later need to be adjusted in Merlin.

All requisitions picking slips must be confirmed to finalise the transaction.

Picking slips must be retained by pharmacy and actioned as follows:
- Confirm picking slip - if items supplied to ward (if/when stock becomes available). this allocates the cost of the items to each ward respectively; or
- delete picking slip - if items not supplied (See below)

Picking slips **must not** be ignored. They must not be discarded unless they have been actioned by confirming or deleting.

How to Confirm a Picking Slip:

INVENTORY --> 5. Transaction Processing

- Step 1: Type in the Site Code. This may already appear on the screen by default.

```
─────────────── Transaction Selection (0) ───────────────
  Site Code ...: PH01    PHARMACY - MAIN STORE
  Cost Centre .: E0500  Pharmacy Expense
  Site Type ...: MS     MAIN STORE

  --- Decrease Stock ---          --- Increase Stock ---
  1 - Issues                      8 - Goods Received
  2 - Return to Supplier          9 - Goods Received Adj
  3 - Adjustment MINUS           10 - Return to Stock - Single
  4 - Transfer OUT               11 - Return to Stock - Multi
  5 - Transfer OUT - Multi       12 - Adjustment PLUS
  6 - Unplanned Issue - Multi
  7 - Unplanned Issue - Single
  Option.:_____
  Select Transaction Type or <Esc> to Exit
```

- Step 2: Press **1** to select the '**Issues**' option.

All outstanding Picking Slips for that Main Store will then be displayed on the screen. The total number of 'queued' picking slips is listed at the top of the screen.

```
┌─────────────── Stock Issues (1) ───────────────┐
  Site Code       : PH01    PHARMACY - MAIN STORE
  Reqs in Queue .: 50          Total number of
                               Requisitions outstanding

  Req No   Ord Site/ Description      Date       Time    PDE    OpId
      2375 CCU    CORONARY CARE UNIT   21/09/2012 14:50   306>   VT
      2376 CCU    CORONARY CARE UNIT   24/09/2012 12:16   206>   VT
       756 ABC    ABC TEST SITE        04/02/2011 11:31          RIL
       757 ABC    ABC TEST SITE        04/02/2011 11:32          RIL
      2385 PH22   PHARMACY GOLLMANN RO>09/10/2012 17:04          VT
      2415 ICU    INTENSIVE CARE UNIT  13/11/2012 12:03   506>   VT
      2416 ICU    INTENSIVE CARE UNIT  13/11/2012 12:04   706>   VT
      2418 ICU    INTENSIVE CARE UNIT  13/11/2012 12:25   906>   VT
      2420 PH06   PHARMACY LEVEL 6 SUB>09/01/2013 11:45   236>
      2421 CCU    CORONARY CARE UNIT   15/01/2013 12:30          HAI

  Option.:2421_____  User    Type in Requisition
  Please enter your User Id
```

- Step 3: Enter the required Requisition Number to process (printed on the top left corner of the picking slip).
- Step 4: Enter your User ID.
- Step 5: The products associated with that Requisition will be displayed on the screen.


```
┌─────────────── Stock Issue Confirmation ───────────────┐
 1.Supp Site .: PH01   PHARMACY - MAIN STORE    User id.: ******    Req Date: 15/01/2013
 2.Ord  Site .: CCU    CORONARY CARE UNIT        Req No .: 2421     6.Ord Site Local .: N

 7.Inv Code Generic Description  Strength/Form      Pack    8.Trade Brand       9.Tax   10.Qty
 1 PARA15  PARAFFIN WHITE SOFT  50%-50% (500g) OI JAR(1)     DER18   DERMEZE              2
 2 RAMI9   RAMIPRIL             10mg CAPSULES   BOX/C(30)     ?_____         1
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
                                                  Issue Pack.:           Pack Cost..:
                                                  Status...:             Qty O/Hand:

 Enter OPTION, <F1>=help....:8.2_____           (ICT.STKISSUE,A)
 Enter Trade Brand supplied
```

- Step 6: Enter the **trade brand** for each product (click on line item in Field 8 and type "**?**" then enter). *Note: some institutions may decide to skip this step.*
- Step 7: Make any changes to the quantities as required.
- Step 8: At the option line, type "**F**" to file

A red message appears at the bottom of the screen – press **Y** > to confirm the transaction.

A confirmation Printout can be generated if required (optional).

9.4. Credits - Returning Imprest Stock (RTN)

Imprest Stock that is returned back to pharmacy should be processed in Merlin as outlined below. This will update the stock levels in the Main Store (Pharmacy) and create a credit to the ward for the cost of the items. The imprest Return screen is the opposite of the Unplanned Issues Screen – all fields are the same except for the first 2 which are reversed.

- INVENTORY --> 5. Transaction Processing --> Enter supply site-->Option 10 Return to Stock - Multi
- Step 1: Enter Supply site code (i.e. dispensary) – or type **?** to display look up menu
- Step 2: Enter Return site code – or type **?** to display look up menu.
- Step 3: Enter your **User ID.**
- Step 4: **Enter** through Field 4 **Remarks** without making any notes.
- Step 5: Enter required drug (see section 3.3 - Drug Search Rules) in Field 5, Line 1
- *OR – scan barcode on item pack if available*
- Step 6: Specify Trade brand in Field 6 – type **?**to view available trade brands in preferred ranking order
- Step 7: Field 7 shows whether you are returning the stock in units **(U)** or issue packs **(I).** Leave the default as**(I)** unless you are issuing less than the standard pack size (e.g. 3 amps from pack of 5)
- Step 8: Enter **Quantity** in Field 8, Line1 (If more items to be supplied: Press **Enter** and repeat steps 5 - 7 on line 2 etc.)
- Step 9: Press **Enter** to jump to Option Line on bottom of screen
- Step10: Type "**F** " to finalise the transaction; Type "Y" to red message "Confirm OK to File".

Items will be credited from the ward.

- Type **P** to print (allow printer default settings).

A 'Credit Note Report' will print from Merlin to confirm transaction and indicate a reference number.

9.5.   Inter-Hospital Transfers

There are occasions when it is necessary to move stock between various Dispensaries i.e. between main store/substore. It is the responsibility of the Issuing site (site providing stock) to complete the process outlined below.

- INVENTORY --> 5.Transaction Processing
- Type in the Main Store (this should default to your main store already)
- Select **Option 4** - 'Transfer OUT'

```
┌──────────────── Transaction Selection (0) ────────────────┐
   Site Code ...: PH01     PHARMACY - MAIN STORE
   Cost Centre .: E0500  Pharmacy Expense
   Site Type ...: MS     MAIN STORE

   --- Decrease Stock ---          --- Increase Stock ---
    1 - Issues                      8 - Goods Received
    2 - Return to Supplier          9 - Goods Received Adj
    3 - Adjustment MINUS           10 - Return to Stock - Single
    4 - Transfer OUT               11 - Return to Stock - Multi
    5 - Transfer OUT - Multi       12 - Adjustment PLUS
    6 - Unplanned Issue - Multi
    7 - Unplanned Issue - Single
   Option.:_____
   Select Transaction Type or <Esc> to Exit
```

In the 'Transfer OUT' Window:
- **Field 2:** Inv Code- Type the respective Inventory Code using the usual drug search rules
- **Field 4**: To Site - Enter the applicable store code (pharmacy) to where the stock is being transferred. If code is not known type in ? to search for all sites.
- **Field 5:** Local Transfer – Always type 'Y'. Take Note of TFR Ref No under Field 5 for future reference
- **Field 7**: Tfr Date – Type transfer date. Can type in '0' for today's date.
- **Field 8:** Remarks – Type any appropriate remarks or skip. (free text field)
- **Field 10:** Issue Measure – Type either 'I'=Pack or 'U' = Unit
- **Field 12:** TfrQty – Type No of packs or units issued
- Type '**F**' and press **ENTER** to finalise transaction.

```
┌──────────────── Transfer OUT (1) ────────────────┐
 1:Site Code ..: PH01     PHARMACY - MAIN STORE
 2:Inv Code ...: AMOX15     AMOXYCILLIN
                            500mg CAPSULES

  Location ...:            Bin .: M64

 4.TO Site ........: PH22    PHARMACY GOLLMANN ROBOT      N0503
 5.Local Transfer .: Y

   Tfr Ref No .:    88       7.Tfr Date ......: 10/01/2013
 8.Remarks ....: need stock

   Qty O/Hand .:     67.0000   10.Issue Measure .: I
   Tfr Type ...: -            -------- Description --------
12.Tfr Qty ....:      1.0000    BOX(20)Capsules
13.Item Cost ..:      0.0120    Extended Cost .:      0.0120
  Option.:_____
  <F>=file, <ESC>=exit, <#>=field no
```

9.6.   View Imprest Lists

The Ward Imprest List screen displays a simple list of items kept on a ward's imprest.

INVENTORY --> 3.Imprest Stock --> 4. Imprest List Maintenance/Print

Enter the site code for the imprest list required. Type **?** for a look-up menu for all sites

In **List Ref,** enter "ALL" to view all imprest lists (including sub-lists) for that site code. OR enter/select a sub-list.

View items by scrolling up/down the page.

Items are listed in alpha-generic order. The list also displayed the Max quantity kept on that ward and should be referred to when issuing stock.

All items listed are generic unless a specific trade brand has been nominated for that ward. If a trade brand was specified it would be listed in right hand section on the list (field 6) next to the Quantity.

'Sub-lists' can be set up to group items into a product group. Examples of sub-lists include:
- DDs (Schedule 8 drugs) / S4Ds (Schedule 11 drugs)
- Refrigerated Drugs
- Injectables
- Orals

- Miscellaneous (oral mixtures, topical, inhalers, suppositories, etc.)

9.7. Stock Availability Enquiry

The 'Stock Availability Enquiry' screen will display the Qty available of an inventory code for a Site Code. The screen can be found: Inventory → 2. Enquiry Procedures → 3. Stock Availability Enquiry

```
─────── Stock Availability Enquiry (0) ───────
1:Site Code .: PH01      PHARMACY - MAIN STORE
2:Inv Code ..: AMOX14      AMOXYCILLIN
                            250mg CAPSULES

   Issue Measure .: E              Location .: GREY ROOM
   Internal Issue.: BOX/C  BOX     Bin ......: SHELF 2
   Units/Issue ...: 20

   Qty On Hand   - Qty Committed   = Qty Available
      996.0000        100.0000          896.0000
                             12<Total Stock Holdings>

   Option.:_____
   <ESC>=exit, <F>=continue
```

9.8. Imprest Search - Sites/Wards with possible stock

The 'Sites With Possible Stock' screen will display all sites with the requested stock, and their usual stock level. NOTE: The stock level is not the current Quantity on hand value.

> INVENTORY --> 2.Enquiry Procedures --> 4. Sites with Possible Stock
>
> **Field 1:** Enter the Inventory Code of drug you are enquiring about, or search for it using the usual drug search rules.
>
> All wards that have that item on imprest will be displayed.
>
> Field 11 allows you to remove the filter for site, so that all locations across all Pharmacy Services sites can be viewed; to select this view change Field 11 (Filter by Site) to **N.**

```
                ── Site With Possible Stocks (0) ──
  1:Inv Code ...: AMOX14    AMOXYCILLIN
                            250mg        CAPSULES

     Product Group TC       TABLETS / CAPSULES   11.Filter by Site Y/N:.Y

  Site   Description              Type Location       Stk.Lvl Last Req
  PH01   PHARMACY - MAIN STORE    MS   GREY ROOM SHELF>    997 .
  PH03   PHARMACY - MANUFACTURING M                         2 .
  PH04   PHARMACY S90 SUB-STORE   SS                      100 14/09/2011
  PH06   PHARMACY LEVEL 6 SUBSTORE SS                       7 02/08/2012
  PH06   PHARMACY LEVEL 6 SUBSTORE SS                       7 09/02/2012
  PH10   PHARMACY - MAIN STORE NO >MS                      20 22/05/2012
  PH22   PHARMACY GOLLMANN ROBOT  SS                        3 09/10/2012
  PH22   PHARMACY GOLLMANN ROBOT  SS                        3 .
  ABC    ABC TEST SITE            I    IMP                  0 27/09/2011
  CCU    CORONARY CARE UNIT       IC   ALL                 10 13/11/2012
  Option.:_____
  'v' page down, '^' page up, <F> to continue
```

Alternatively, the Global Imprest List may be available at your institution and can be found on the Pharmacy Intranet page.

9.9.   Transaction Enquiries for a particular product

The transaction detail screen will display all transactions made for the specified drug in the specified date range

Inventory >Enquiry procedures>Transaction Detail Enquiry

- Enter the site code
- Type the name of the generic drug you are enquiring about in Field 2 and select from the drop down menu if necessary.
- Type **9** at the bottom to enter Field 9.

```
┌─────────────── Inventory Issues Summary ───────────────┐
│ 1: Site Code ........: PH01     PHARMACY - MAIN STORE   │
│ 2: Inventory Code ...: AMOX14   AMOXYCILLIN             │
│                                 250mg CAPSULES          │
│    Internal Issue ...: BOX/C      Units/Issue .: 20     │
│    Period   Quantity      Value   Period  Quantity      Value │
│  31/07/2010  187.9500   248.8794                        │
│                                                         │
│                                                         │
│  Subtotals  187.9500   248.8794          0.0000    0.0000 │
│                                                         │
│                        YTD Total     187.9500   248.8794 │
│ 9<Trans Details> 10<Last Year> 11<Comparison> 12.Include WBox Trans.: Y │
└─────────────────────────────────────────────────────────┘
```

An Inventory Transaction Enquiry Setup Screen appears.

- Enter **Y** for all fields 1 through 8.
- Leave field 9 blank.
- Enter in fields 11 and 12 the date range for your enquiry (enter **0** for today's date).
- Enter **S** in field 13
- Enter **C** at the bottom to Continue.

```
┌──────────── Inventory Transaction Enquiry (1) ────────────┐
│              Transaction Enquiry Setup Screen             │
│  **** Transaction Types ****    **** Period / Date Range **** │
│                                                           │
│ 1.Goods Receipts ........: Y     9.Include WBox Trans ....: │
│ 2.Returns to Supplier ...: Y                              │
│ 3.Issues ................: Y    10.Period Number .........: │
│ 4.Returns to Stock ......: Y                              │
│ 5.Transfers .............: Y    11.Date FROM ............: 01/12/2012 │
│ 6.Adjustments ...........: Y    12.Date  TO .............: 11/01/2013 │
│ 7.Dispensed .............: Y    13.System/Trans. Date.....: S │
│ 8.Point of Sale .........: Y                              │
│  Option.:c_____                                       │
│  Enter <C>ontinue, Field number to Amend, <ESC> to exit  │
└───────────────────────────────────────────────────────────┘
```

A Transaction Details Screen appears.

- Column 1: Transaction Type i.e. GR = Goods Receipt, RTS = Return to Supplier, ISS = Issue, RST = Return to Stock, TFR = Transfer, ADJ = Adjustment, DIS = Dispense, POS = Point of Sale
- Column 2: Date of Transaction
- Column 3: Site No: Site that stock is transacted to.
- Column 5: Issue Unit. Note: this may be a single unit e.g. vial (1) or a bulk/pack unit e.g. box/c (20)
- Column 6: Transaction Quantity. (-) = stock removed. (+) stock added

- Column 7: post balance post transaction

```
┌──────────────────── Transaction Details (2) ────────────────────┐
│   Tran  Trans     Site   Site         Cost   Issue      Trans    Post    │
│   Type  Date      No     Description  Centre Unit       Quantity Balance │
│ 1 POS 03/01/2012 PH01   PHARMACY - M        BOX/C(20)    -1.00   112.8   │
│ 2 ISS 05/01/2012 2WA    CORONARY CAR L2220 BOX/C(20)    -2.00   110.8   │
│ 3 ISS 05/01/2012 2WA    CORONARY CAR L2220 BOX/C(20)    -3.00   107.8   │
│ 4 DIS 13/01/2012 10037 FAKE, PIERRE        BOX/C(20)    -1.00   106.8   │
│ 5 DIS 13/01/2012 10037 FAKE, PIERRE        BOX/C(20)     1.00   107.8   │
│ 6 DIS 13/01/2012 10037 FAKE, PIERRE        BOX/C(20)    -1.00   106.8   │
│ 7 DIS 20/01/2012 123456 MORRISON, SCOTT    BOX/C(20)    -1.00   105.8   │
│ 8 DIS 20/01/2012 123456 MORRISON, SCOTT    BOX/C(20)     1.00   106.8   │
│ 9 DIS 20/01/2012 123456 MORRISON, SCOTT    BOX/C(20)    -1.00   105.8   │
│10 DIS 20/01/2012 123456 MORRISON, SCOTT    BOX/C(20)    -0.15   105.6   │
│ Option.:_____                                                        │
│ 'v'=page='^', '#'=details, <P>rint page, <PA>=print all pages, <ESC>   │
└──────────────────────────────────────────────────────────────────┘
```

Type 'P' to print the current page OR type 'PA' to print all pages.

A detailed description of the transaction can be viewed by typing the row number of that transaction at the options line.

```
┌──────────────── Transaction Details Enquiry (3) ────────────────┐
│ 1:Site Code ..: PH01       PHARMACY - MAIN STORE                │
│ 2:Inv Code ...: AMOX14     AMOXYCILLIN 250mg CP                 │
│ 3:Tr No ......: 758        250mg                                │
│                                                                  │
│   From Site ..: PH01       PHARMACY - MAIN STORE                │
│   Cost Ctr ...: N0503                                           │
│   To Site ....: CCU        CORONARY CARE UNIT                   │
│   Cost Ctr ...: L2220                                           │
│                                                                  │
│   Type    Docref       Iss Unit    Trans Qty   Unit Cost   Ext Cost │
│   DIS  24001/1/0     BOX/C(20)     -1.0000      1.3620     -1.3620 │
│   10037 FAKE, PIERRE                                            │
│   Batch No .:              Exp Date :          Del Note:        │
│   Location .:              Bin No ...:         Trade Brand      │
│   Adj Code .: P      PLANNED TRANSACTION                        │
│   Remarks ..:                                                   │
│   Tran Date : 13/01/2012        Period ...: 1101   Req Date.:   │
│   Updated  .:  VT      13/01/2012  09:48:42   PDE, Op.:      ,  │
│ Option.:_____     Item:1/0                                   │
│ Enter <F> or <ESC>ape to return to Transaction Display screen   │
└──────────────────────────────────────────────────────────────┘
```

10. PBS Online and Claim Management

10.1. What is PBS Online?

The Pharmaceutical Benefits Scheme, commonly known as the PBS, is a federal government program that allows Australian's access to a ranged of prescription medications at subsidised prices.

Pharmacies charge patients the patient co-pay, as determined by the government each year, and then claim back the difference between the co-pay and the cost of the drug. This rebate can be claimed a number of ways: manually, using CTS (a paper and disk-based system), or using online channels.

This document explains the way in which Merlin software enables to complete their PBS claims using the online channels, a system know as PBS Online.

10.1.1. How does Online Claiming for PBS work?

The following steps are involved when you make a claim through Online Claiming for PBS:
- The patient presents you with PBS/RPBS prescription.
- You enter the prescription information into Merlin.
- Merlin sends a transaction to Medicare.
- Medicare checks the details of the prescription against PBS/RPBS rules including patient entitlement checks through a direct link to Centrelink before you dispense the medicine.
- Medicare sends a message to inform you whether the claim is payable. In some cases, you will need to correct an error or omission before making a claim. This can be done before you supply the medicine to the patient.
- The medicine is supplied to the patient.
- At the end of your hospital pharmacy's claiming cycle (claim period) you send a Close Claim transaction to PBS Online (after completing the declaration statement) and retain prescription paperwork for two years (electronic or paper form).
- All paper prescriptions must be retained by the hospital for 2 years for audit and verification purposes.
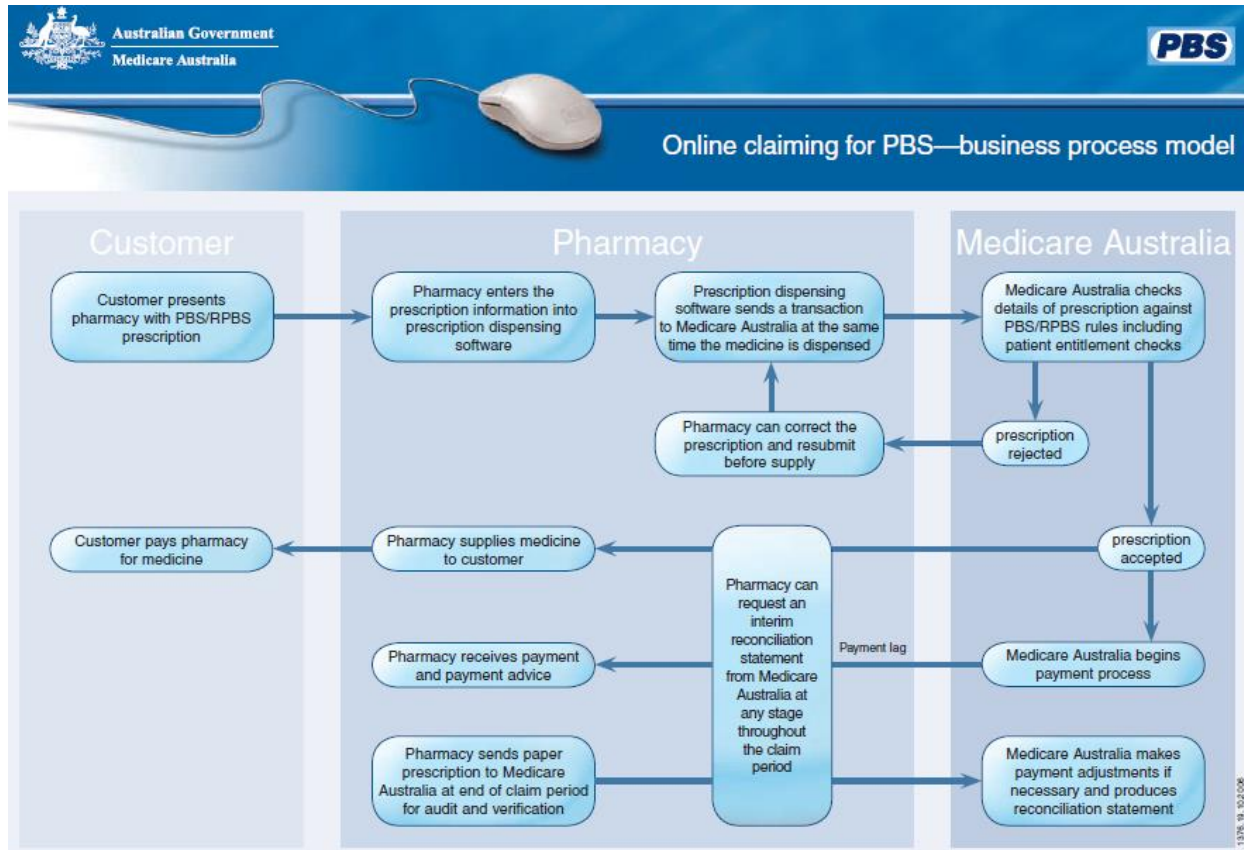
10.1.2. Benefits

Using PBS Online Claiming provides a faster and better way to claim PBS items. The benefits of using PBS Online Claiming include:

- Automatic assessment and claiming, including online eligibility checking, which flags potential rejections at the point of dispensing, allowing errors to be quickly corrected
- Reduction in paperwork and processing time resulting in increased efficiency
- Certainty of the amount that Medicare will pay
- More regular (weekly) automatic payments from Medicare
- Electronic Statements automatically reconciled by Merlin

10.1.3. Operational Overview – High Level Specification
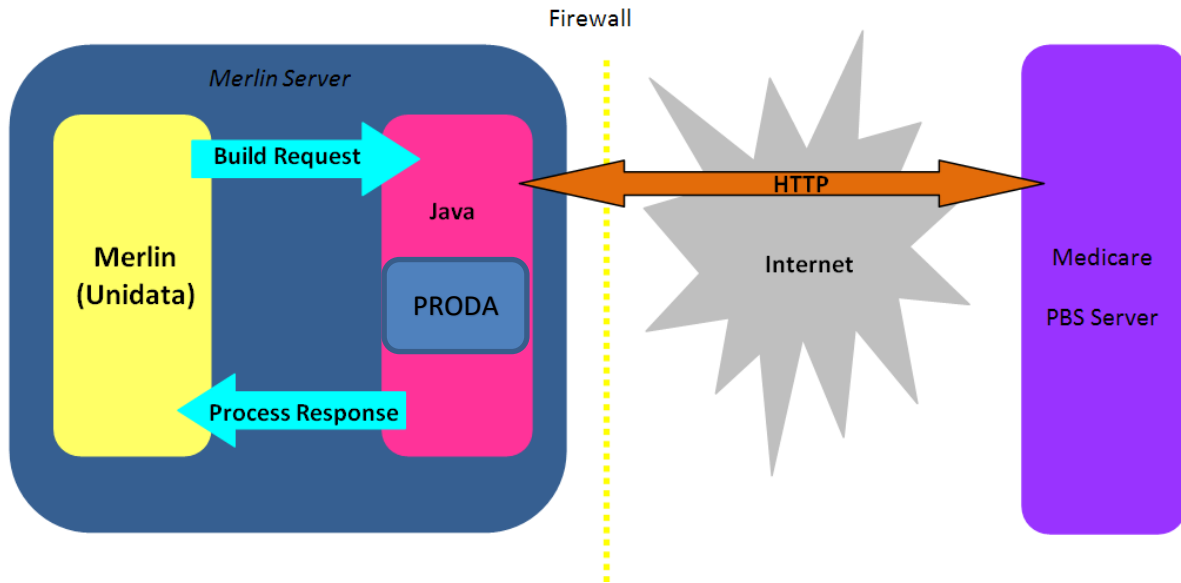
- Pharmacy user generates a PBS claim message
- Merlin builds the message between unidata and java (merlin server)
- The message encrypts with the PRODA (private key) and is transmitted to Medicare using HTTP (i.e. over the internet)
- Medicare processes the claim message
- Medicare sends a response back to the pharmacy, via the original connection
- Java and unidata (merlin server) process the response
- Merlin displays the result for the pharmacy user to interpret

10.2. PBS Online Menu

All PBS online functions can be found in the PBS online menu, except the Payment Validation Report.

ZOOM: PBSOL Or Dispense → 7. Specialised Facilities → 2. PBS Claim Processing Menu → 3. PBS Claim via Online Menu
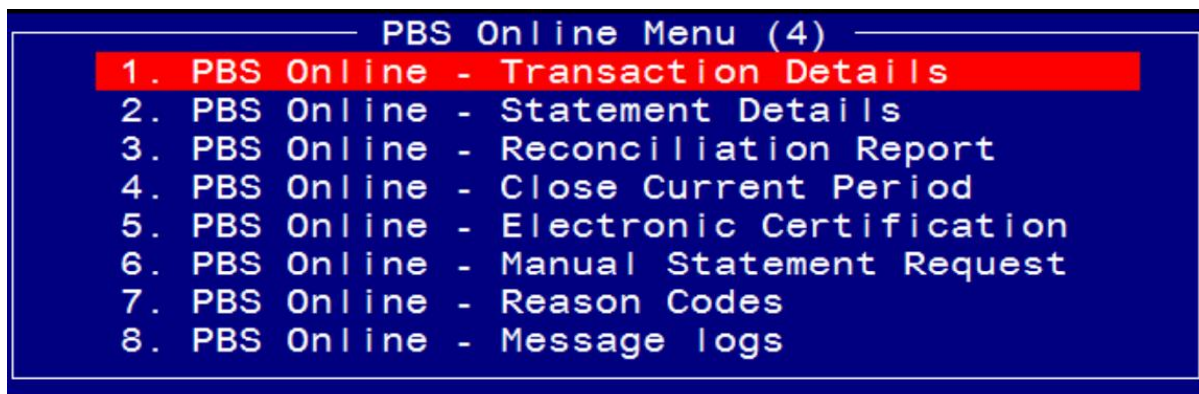
10.3. Connection to PBS Online Claiming Service

The PBS Online live connection status is displayed at the top of the Dispense screen, above the Patient Profile/PBS Online/PBS Authority panel.

- If the 'PBS Online'status is highlighted in green, then there is live connection with PBS Online.
- If the 'PBS online' status is red, this means that there is a connection issue between Merlin and the PBS online Claiming service.

PBS Online Status Bar:
Displays the connection status between Merlin and Medicare.

10.3.1. What to do if you are not connected to PBS Online Claiming

- Firstly, check if Medicare PBS Online is running. Refer to Section 10.3.2 – Is Medicare PBS Online Running?
- If Medicare PBS Online is working fine, check the PBS Online Message Log. Refer to Section 10.3.3 – PBS Online Message Log.
- If and error 'ERR' is displayed in the PBS Online Message Log, contact Pharmhos for further assistance.

NOTE: Pharmhos has a live connection to your institution's Merlin server. Any connection or messaging anomalies are usually picked up by Pharmhos' monitoring tool.

10.3.2. Is Medicare PBS Online Running?

If scripts are queued up in the Merlin PBS online window and have not been processed for a period of time OR if the 'PBS Online' status in the dispense screen is RED; there might be a technical glitch from Medicare's end. Medicare has two websites which can be checked for current speed and availability of their connections.

Availability: shows if Medicare is UP (GREEN box) or DOWN (RED box)
https://medicarestatus.humanservices.gov.au/healthsystemmonitor/external/pbsclaimsstatus.xhtml

Check PBS online service status

Status current as at 15:29 28/2/2013

eBusiness Service Available

Refresh Status

Status current at 28/02/2013 03:25:40 PM

Average Claim transmission response time

1.31 seconds

This gauge displays the average internal response time in the last 2 minutes for Claim transmissions.
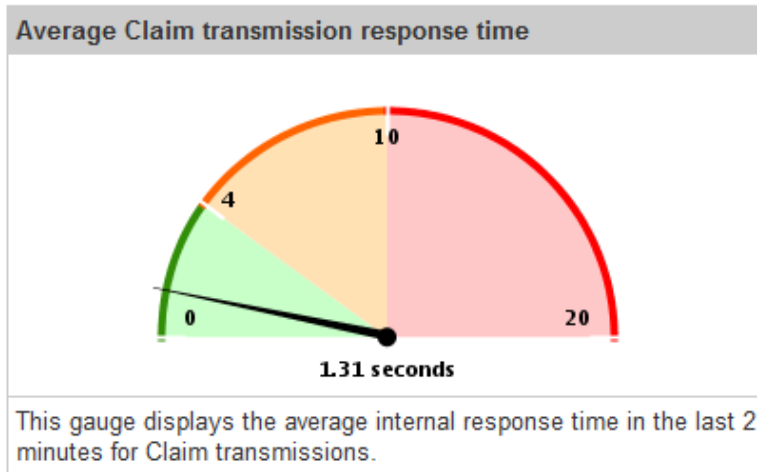
System status

Status	Service Name	Message
▲	Claims	System is operating normally

10.3.3. PBS Online Message Log

The PBS Online Message Log displays information being fed backwards and forwards between Merlin and Medicare. A message (MSG) sent from Merlin will result in a response (RSP) appearing on this screen from Medicare. If there are transmission problems, this screen may also display an error (ERR). If you see an error on this page, and a failure in internet connection can be eliminated as the cause, contact Pharmhos for further assistance.

From the PBS Online menu, choose option 7. PBS Online – Message Log
Field 1 – Log File displays the default GF.PBSOL.LOG. This is the only acceptable value.

```
Pharmhos Software Pty Ltd                                  Port:scottmnb/6    12:28:32 01 Mar 2013
  1:Log File: GF.PBSOL.LOG
  1.MSG GFU.PBSCLMSRV 18/02/2013 04:01:05  MSH Action=CLM TimeStamp=09:50:37 15 Feb 2013^CLM
  2    Action=com.pharmhos.pbs.UnCoCreateClaimProcess ApprovalNum=HN248L ClaimPeriodNum=1201 ClaimReference=0013
  3    UniquePharmacyPrescriptionNum=000242680101 Brand=QA DateOfDispensing=15102012 DateOfPrescribing=15102012
  4    DateOfSupply=15102012 EntitlementId=VX000850 FamilyName=TESTING GivenName=JUDY GlassBottleInd=N
  5    ImmediateSupplyNecessaryInd=N NumberOfRepeats=0 PatientCategory=1 PaymentCategory=4 PbsItemCode=01889K
  6    PharmacyProcessingCode=00 PrescriberId=1001026 PreviousSupplies=0 Price=000000 Quantity=20 Regulation24Ind=N
  7    ResubmissionInd=N SerialNum=00005 FormCategory=5 pbsolID=HN248L_1201_0013 ^
  8 MSG GFU.PBSCLMSRV 18/02/2013 04:01:05  MSH Action=CAN TimeStamp=09:47:05 15 Feb 2013^CLM
  9    Action=com.pharmhos.pbs.UnCoCancelClaimProcess ApprovalNum=HS027J ClaimPeriodNum=1201 ClaimReference=0168
 10    UniquePharmacyPrescriptionNum=000243270100 PbsReferenceNum=100007721677 pbsolID=HS027J_1201_0168 ^
 11 MSG GFU.PBSCLMSRV 18/02/2013 04:01:04  MSH Action=CLM TimeStamp=16:35:58 13 Feb 2013^CLM
 12    Action=com.pharmhos.pbs.UnCoCreateClaimProcess ApprovalNum=HN248L ClaimPeriodNum=1201 ClaimReference=0012
 13    UniquePharmacyPrescriptionNum=000243430200 Brand=SW DateOfDispensing=13022013 DateOfPrescribing=31012013
 14    DateOfSupply=13022013 FamilyName=NGUYEN GivenName=HAI GlassBottleInd=N ImmediateSupplyNecessaryInd=N
 15    MedicareNum=25437766611 NumberOfRepeats=1 PatientCategory=1 PaymentCategory=1 PbsItemCode=01746X
 16    PharmacyProcessingCode=00 PrescriberId=1001026 PreviousSupplies=0 Price=000000 Quantity=100 Regulation24Ind=N
 17    ResubmissionInd=N SerialNum=00015 OriginalApprovalNum=HN248L


Enter OPTION, <F1>=help....:_____            (PHU.PBSOLLOG,M)
<F>=file, <ESC>=exit, </D>=delete, <#>=field no
```

10.4. Dispense Processing with PBS Online Claiming

10.4.1. Dispense a New Prescription with PBS Online Claiming

- Process the prescription into Merlin as per Section 5: Dispense – Standard In-house PBS prescription.
- Each prescription will be sent to Medicare through the PBS Online Claiming channel once it is filed/printed.
- Once received through the PBS Online channel, Medicare will assess the prescription details against the relevant PBS rules and return an online response to you.
- The response will be one of the following:
  - o The prescription has been accepted for payment
  - o The prescription has been accepted for payment but may contain errors that have resulted in a warning &/or information 'Reason Codes'
  - o The prescription contains errors that has resulted in a rejection. Errors have corresponding 'Reason code(s)'.
- The response is displayed as PBS Online Status Codes in the Merlin dispense screen panel (Refer to Section 10.5 – PBS Online Status Codes). If the PBS Online Status Code displays **A**, then the prescription has been accepted for payment – THIS IS WHAT YOU WANT!

NOTE:

If you notice that the prescription you have processed is still displaying a W 'Wait to Send' status, check whether

previous prescriptions are also displaying W . If this is the case, refer to Section 10.3 – Connection to PBS Online Claiming Service.

- If the prescription contains errors, then the response includes reason code(s). Refer to Section 10.6 – PBS Reason Codes.
- Each prescription is supplied a PBS Serial Number. The PBS Serial Number is a combination of:
  - The patient entitlement type i.e. G = General, C = Concessional, E = Entitlement, R = Repatriation
  - The Authority status i.e. 'A' included in the PBS Serial Number if the script is Authority
  - The Underco status i.e. 'U' included in the PBS Serial Number if the script is Undercopayment
  - The next available number e.g. if the previous script is 8, then the new script is 9.
- Relevant PBS data is printed on the dispensing label (as shown below).
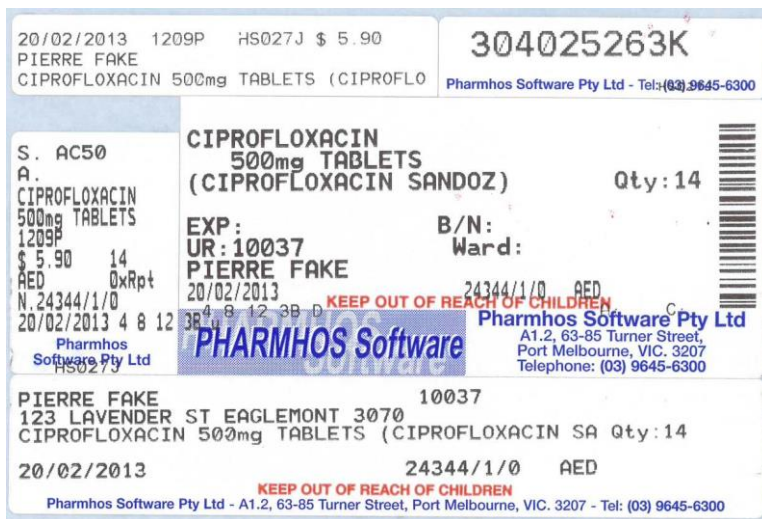
- If the prescriber had ordered repeats on the prescription and a value is added in the dispense screen field 14, a repeat prescription form is printed.
  - See below for a sample repeat prescription form printout.
  - Note: Other details can be printed on the repeat prescription form e.g. repeat prescription code with/without barcode. Consult Pharmhos if you would like extra details added on the repeat form.

Repeat prescription form

- Number of repeat prescriptions left
- Medicine name, strength and form (tablets, cream, etc)
- Quantity of medicine per prescription
- Dosage instructions and warnings (if any)
- Number of repeat prescriptions already filled, including the orginal prescription
- Date prescription written
- Number of repeat prescriptions authorised
- Date when prescription expires

10.4.2. Adjust a Prescription with PBS Online Claiming

To edit a PBS prescription,

- Select the medication from the Patient Medication History; OR
- Enter the script number in Field 1-Pt in the Dispense screen; OR
- Enter the script number in the PBS Online Transaction screen, and enter E and the line number required. A warning message appears (as shown below). If **Y** is selected, the dispensing screen will open and details of the prescription may be edited.

Process the prescription in Merlin as per Section 5.11.1 – Edit a Script.

- Certain fields in the Dispense screen e.g. field 11-Directions, can be adjusted without Merlin re-serialising the script and sending the altered message to Medicare for re-processing.
- Whereas, alterations to other fields e.g. field 13-Qty, can lead to a re-submission to Medicare. This will generate a new serial number.

NOTE: To Reclaim a script you must:

- type F (file) or P (print) at the option line in the dispense screen; OR
- type W at the option line in the Dispense Screen.

This will generate a new serial number*

The old serial number is cancelled from the claim, and marked with in the PBS Online Status Bar/Transaction screen.

10.4.3. Cancel a Prescription with PBS Online Claiming

Terminating or **Deleting** a prescription removes it from the PBS claim. It is preferable to terminate a prescription – however, it is necessary to delete a prescription if it is dispensed incorrectly to the wrong patient. Refer to Section 5.11.2 – Delete/Terminate a script.

The serial number is cancelled from the claim, and marked with in the PBS Online Status Bar/Transaction screen.

10.4.4. Placing a Prescription on Hold

Sometimes it is necessary to withhold scripts from the claim. This is handled in the PBSOLT screen using the following steps:
- ZOOM: PBSOLT
- Enter the script number in Field 1
- The view (field 3) must be set to F for Financial View to see the script totals. (This cannot be seen in the <C> Claim View setting)
- At the option line press <H>followed by the line number to withhold a script from the claim.
- A warning message will appear. If **Y** is selected, the prescription will be placed on Hold and not submitted to Medicare with the current claim. The status code will become an

─ Message ─
─On Hold 24084/1/0 MORRISON, Sc METRONIDAZOLE 400mg TA Confirm<Y/ ─

NOTE: Placing a script on hold will remove it from the 'Ok to send in script bundle'.
Refer to Section 10.7 – PBS Online Transaction Details

10.4.5. Transfer a Prescription to the Next Claim Period

It may be necessary to transfer a prescription to the next claim period if:
- A prescription that was missing from the previous claim is found and needs to be reclaimed
- A prescription requiring alterations

NOTE: if a paper-required prescription is transferred to the next claim period, that paper prescription must be retrieved and resent in the new claim period; otherwise, the prescription will not be reimbursed.

To transfer a prescription to the next claim period:
- Call up the script number in the dispense screen
- Make changes to the script, if required
- Type W at the option line
- A warning message will appear. If **Y** is selected, the prescription will be transferred to the next claim period.
  This will generate a new serial number*

─ Message ─
─WARNING - Overwrite of PBS Period/Serial No. & Print <Y>=continue ─
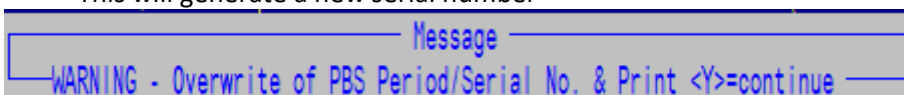
The old serial number is cancelled from the previous claim period, and marked with in the PBS Online Status Bar/Transaction screen.

10.5. PBS Online Status Codes

The response is displayed as PBS Online Status Codes in the Merlin dispense screen panel. These codes indicate the status of PBS Claimable scripts from PBS Online.

The response will be one of the following:

W Waiting to Send

C Cancelled

A Accepted for payment

R Rejected

X On Hold

B Unable to Cancel

U Under copayment script

J Under copayment script, Rejected by Medicare

NOTE: The PBS Online Panel displays the last 17 dispensed transactions processed by Medicare.

In addition, the response message can be found in the PBS Online Transaction Details Screen. Refer to Section 10.7 – PBS Online Transaction Details.

```
Pharmhos Software Pty Ltd                                  Port:scottmnb/2    09:12:54 19 Feb 2013
  1:Rx No OR Appr No:HS027J       2.Type:A   3.View:F   4.Status:*
  5.Period:1201  OR 6.Date From:        7.Date To:
   Serial T   Item Mfr  Dispensed  Script No    Est Rebate Act Rebate Difference R Reason      Prd ClmRef Patient Name
 1    U2   1609Q QA               24081/1/0       0.00      0.00      0.00 J R142       1201  0001 MORRISON, Scott
 2    U3   1621H AF 16.04.2012 24084/1/0          0.00      0.00      0.00 U I635       1201  0002 MORRISON, Scott
 3    U4   1917X    04.05.2012 24089/1/0          0.00      0.00      0.0  U W043,I635  1201  0003 MORRISON, Scott
 4    U5   1889K    04.05.2012 24089/2/0          0.00      0.00      0.00 J R978,R062  1201  0004 MORRISON, Scott
 5    U6   1917X    07.05.2012 24090/1/0          0.00      0.00      0.00 U W043,I635  1201  0005 MORRISON, Scott
 6    U11  1917X    15.10.2012 24101/1/0          0.00      0.00      0.00 U W043,I635  1201  0006 MORRISON, Scott
 7    U13  1916W    15.10.2012 24107/1/0          0.00      0.00      0.00 J R978,R062  1201  0007 MORRISON, Scott
 8    U14  1889K    15.10.2012 24108/1/0          0.00      0.00      0.00 J R978,R062  1201  0008 MORRISON, Scott
 9    U15  1621H    15.10.2012 24108/2/0                              0.00 C I015       1201  0009 MORRISON, Scott
10    U15  1621H    15.10.2012 24108/2/0                              0.00 C I015       1201  0011 MORRISON, Scott
11    A16 c 9653C NV 07.0                                             0.00 C            1201  0010 MORRISON, Scott
12    17   30N      07.0                                              1.20 S W095,W101  1201  0012 NGUYEN, Hai
13    U18  30N      07.0                                             28.81 X R978,R403  1201  0013 NGUYEN, Hai
14    A19  9188N AB 09.05.2012 24115/1/0       1738.96   1776.73     37.77 S W095,W101,W1 1201 0014 NGUYEN, Hai
15    U23  3192B AB 17.05.2012 24116/1/0                              0.00 C I015       1201  0015 SMITH, Aaron
       ......                            .......... .......... ..........
     Total   183                          42481.77   6929.34  -35552.43
Enter OPTION, <F1>=help....:_____                  (PHD.PBSOL,M)
<D#>=details, <E#>=edit/remove, <H#>=Hold, <P>=Print/Display, <X>=Export
<up>/<down>=page, <esc>=exit
```

PBS Online Status code displayed for each item.

10.6. PBS Online - Reason Codes

If a prescription is rejected by PBS Online, it will be assigned one or more reason codes explaining why it wasn't accepted.

- Codes that are prefixed with an *I* are *INFORMATION* – no action is required
- Codes that are prefixed with a *W* are *WARNINGS* – action may be required, read the reason code for more details
- Codes that are prefixed with an *R* are *REJECTIONS* – action is required, read the reason code for more details

The following are examples of reason codes provided by Medicare:

`C I015`

- The C reflects the Merlin status of the script which has been cancelled; the I015 is information, reason code 015, to reflect confirmation from Medicare that the script has been successfully removed from the claim.

`A W111`

- The A reflects the Merlin status of the script which has been accepted by Medicare; the W111 is a warning, reason code 111, explaining an error with the Medicare number submitted with the prescription. The prescription will still be paid, however, if the same warnings are issued repeatedly to a pharmacy, Medicare will start to reject the prescription instead.

`R R280`

- The R reflects the Merlin status of the script which has been rejected; the R280 is a rejection, reason code 280, explaining that the item is not payable as the price is less than or equal to the patient contribution.

Refer to the Medicare website for a complete list of PBS Online Reason Codes.

The reason code(s) are displayed for scripts with errors in the PBS Online Transaction screen.

```
Pharmhos Software Pty Ltd                              Port:scottmnb/2    09:12:54 19 Feb 2013
 1:Rx No OR Appr No:HS027J      2.Type:A   3.View:F   4.Status:*
 5.Period:1201  OR 6.Date From:        7.Date To:
    Serial T   Item Mfr  Dispensed  Script No   Est Rebate Act Rebate Difference R Reason      Prd ClmRef Patient Name
 1   U2   1609Q QA               24081/1/0       0.00      0.00       0.00 J R142       1201 0001 MORRISON, Scott
 2   U3   1621H AF 16.04.2012 24084/1/0          0.00      0.00       0.00 U I635       1201 0002 MORRISON, Scott
 3   U4   1917X    04.05.2012 24089/1/0          0.00      0.00       0.00 U W043,I635  1201 0003 MORRISON, Scott
 4   U5   1889K    04.05.2012 24089/2/0          0.00      0.00       0.00 J R978,R062  1201 0004 MORRISON, Scott
 5   U6   1917X    07.05.2012 24090/1/0          0.00      0.00       0.00 I W043,I635  1201 0005 MORRISON, Scott
 6   U11  1917X    15.10.2012 24101/1/0          0.00      0.00       0.00 U W043,I635  1201 0006 MORRISON, Scott
 7   U13  1916W    15.10.2012 24107/1/0          0.00      0.00       0.00 J R978,R062  1201 0007 MORRISON, Scott
 8   U14  1889K    15.10.2012 24108/1/0          0.00      0.00       0.0  J R978,R062  1201 0008 MORRISON, Scott
 9   U15  1621H    15.10.2012 24108/2/0                                 0.00 C I015     1201 0009 MORRISON, Scott
10   U15  1621H    15.10.2012 24108/2/0                                 0.00 C I015     1201 0011 MORRISON, Scott
11   A16 c 9653C NV 07.05.2012 24109/1/0                     0.00       0.00 C          1201 0010 MORRISON, Scott
12   17   30N      07.05.2012 24111/1/0        28.01     30.01      20 S W095,W101     1201 0012 NGUYEN, Hai
13   U18  30N      07.05.2012                                    81 X R978,R403       1201 0013 NGUYEN, Hai
14   A19  9188N AB 09.05.2012                                    77 S W095,W101,W1    1201 0014 NGUYEN, Hai
15   U23  3192B AB 17.05.2012 24116/1/0                                 0.00 C I015     1201 0015 SMITH, Aaron
     ......                                    .........  .........  .........
     Total    183                             42481.77   6929.34  -35552.43
Enter OPTION, <F1>=help....:_____                 (PHD.PBSOL,M)
<D#>=details, <E#>=edit/remove, <H#>=Hold, <P>=Print/Display, <X>=Export
<up>/<down>=page, <esc>=exit
```

Reason code(s) displayed for prescriptions with an error

Enter **D** and the line number required and a detailed prescription window will open. This window is a display only and no data can be entered here. If the item has been issued with a reason code from Medicare, further details are outlined.


```
                    PBS Online - Script Details (1)
 Patient
 UR No.:123456 - DOB:15/09/1964
 MORRISON, Scott
 C/- Pharmhos Software 63-85 Turner Street 63-85 Turner Street
 PORT MELBOURNE 3207
 Medication
 PREDNISOLONE 5mg TABLETS
 RxNo: 24101/1/0 Original  1917X Qty: 60
 Written:04/05/2012 Dispensed:15/10/2012 Claim Period:1201
 Cost$:1.57 PtChrg$11.55 Claim$0.00 Paid$:0.00 Net$:9.98
 PBS Online Status: U    - Reason Codes:W043,I635
 Reason Code Details
 Reason Code - 043 - WARNING - Description -
 The prescriber number was not provided.
 Fix Instructions -
 1. The prescriber number must be in the format 0000001-9999999 with no blanks. 2. Check that the prescriber
 number on the paper prescription match the details provided in your claim. If the prescriber number is not
 Option.:_____
 <UP> / <DOWN> to scroll  <ESC>=exit
```

Refer to Section 10.7 – PBS Online Transaction Details.

The 'PBS Online Reason Codes' screen can be used to view further information about a particular reason code and how the problem may be resolved, so that the prescription can be reclaimed.

- From the PBS Online menu, choose option 6. PBS Online – Reason Codes
- To search a reason code, you can use a **"?"** look-up in field 1. Alternatively, you can type the reason code you're interested in into field 1.
- This will complete the rest of the fields with information relating to that reason code. Note, field 2 – type stipulates whether the code pertains to a rejection, a warning, or just information from Medicare.

```
─────────── PBS Online - Reason Codes (0) ───────────
   PBS Online Reason Codes - Assigned by HIC Only
 1:Reason Code.:636        2.Type.:R        Log.:11-07-2012 11:40 PHU.EOMU>
 3.Description
   The streamlined authority code was not provided.

 4.Fix Instructions
   1. The streamlined authority code is required for this streamlined
   authority item. 2. Check the item details on the paper prescription
   match the details provided in your claim. 3. If they do not match -
   please correct and resubmit. 4. For further information please contact
   Medicare Australia quoting code 636.



 5.Contact Details for Fix
   Medicare Australia on 132 290 Select Option 2.


 Option.:_____
 <F> to continue
```

10.7. PBS Online Transaction Details

The transaction details screen is a live feed of information between the pharmacy and Medicare. Detailed on the page is a status update of every PBS script processed by the pharmacy and claiming information from Medicare. This includes reason codes for any rejections, warnings, or extra information from Medicare (refer to PBS Online Reason Codes for further information). An estimate of the rebate to be paid is also indicated; this amount is confirmed on the statement details page after the payment is made to the pharmacy.

It is essential to run periodically (e.g. every day) to capture any PBS Online rejection/warning messages that may result in non payment from Medicare. The report can be filtered to select out various parameters (e.g. by script type, by message type) or it can include all items. Problem scripts can be edited directly via this screen. The report can also be printed or exported into Excel if required.

From the PBS Online menu, choose option 1. PBS Online – Transaction Details

```
─────────── PBS Online Menu (4) ───────────
   1. PBS Online - Transaction Details
   2. PBS Online - Statement Details
   3. PBS Online - Reconciliation Report
   4. PBS Online - Close Current Period
   5. PBS Online - Electronic Certification
   6. PBS Online - Manual Statement Request
   7. PBS Online - Reason Codes
   8. PBS Online - Message logs
```

To view the transaction details, the following information is required:

- **Field 1:** Enter the Pharmacy's PBS approval number e.g. HS027J
  - The *?* prompt will bring up a lookup for all local approval numbers.
  - You can enter a script number to view details for a particular item, or an approval number for a particular site to view all scripts.

- **Field 2:** Filter Option – select Script type (G,C,E,R,B) or press <A> to include all script types:
  - **G** for General
  - **E** for Entitled
  - **C** for Concession
  - **R** for Repatriation
  - **B** for Doctors Bag

- **Field 3:** View Option – This field dictates what information is displayed. Select F for Financial (includes payment discrepancies) or C for Claim list (summary version).
  - The main difference is the prescription item is included in the detail on the *Claim List*.
  - However, the *Financial* view contains a more complete picture of the prescription claim details.

- **Field 4** – Status: Filter Option – select which items to display (e.g. rejections only) or press <*> to include all scripts regardless of status.
  - **"O"** for OK to place in script bundle (*this groups together A and S*)
  - **"I"** for Items with a problem (*this groups together W, R, B and H*)
  - **"N"** for Non-CPAP items with a problem
  - **"W"** for Waiting to send
  - **"A"** for Accepted
  - **"R"** for Rejected
  - **"C"** for Cancelled
  - **"B"** for Unable to Cancel
  - **"X"** for On Hold

- **Field 5**: Enter PBS claim period (e.g. 1007)
  - or
- **Field 6 & 7**: Enter date range

The report automatically appears on the screen.
If you select "F" for Financial View in field 3, an example report is shown below.

```
Pharmhos Software Pty Ltd                              Port:scottmnb/2      09:12:54 19 Feb 2013
  1:Rx No OR Appr No:HS027J        2.Type:A   3.View:F   4.Status:*
  5.Period:1201   OR 6.Date From:        7.Date To:
    Serial T   Item Mfr  Dispensed Script No    Est Rebate Act Rebate Difference R Reason      Prd ClmRef Patient Name
    1    U2   1609Q QA              24081/1/0       0.00      0.00       0.00 J R142          1201 0001 MORRISON, Scott
    2    U3   1621H AF 16.04.2012 24084/1/0         0.00      0.00       0.00 U I635          1201 0002 MORRISON, Scott
    3    U4   1917X    04.05.2012 24089/1/0         0.00      0.00       0.00 U W043,I635     1201 0003 MORRISON, Scott
    4    U5   1889K    04.05.2012 24089/2/0         0.00      0.00       0.00 J R978,R062     1201 0004 MORRISON, Scott
    5    U6   1917X    07.05.2012 24090/1/0         0.00      0.00       0.00 U W043,I635     1201 0005 MORRISON, Scott
    6    U11  1917X    15.10.2012 24101/1/0         0.00      0.00       0.00 U W043,I635     1201 0006 MORRISON, Scott
    7    U13  1916W    15.10.2012 24107/1/0         0.00      0.00       0.00 J R978,R062     1201 0007 MORRISON, Scott
    8    U14  1889K    15.10.2012 24108/1/0         0.00      0.00       0.00 J R978,R062     1201 0008 MORRISON, Scott
    9    U15  1621H    15.10.2012 24108/2/0                              0.00 C I015          1201 0009 MORRISON, Scott
    10   U15  1621H    15.10.2012 24108/2/0                              0.00 C I015          1201 0011 MORRISON, Scott
    11   A16 c 9653C NV 07.05.2012 24109/1/0                   0.00       0.00 C             1201 0010 MORRISON, Scott
    12   17   30N      07.05.2012 24111/1/0        28.81     30.01       1.20 S W095,W101     1201 0012 NGUYEN, Hai
    13   U18  30N      07.05.2012 24111/1/1        28.81      0.00     -28.81 X R978,R403     1201 0013 NGUYEN, Hai
    14   A19  9188N AB 09.05.2012 24115/1/0      1738.96   1776.73      37.77 S W095,W101,W1  1201 0014 NGUYEN, Hai
    15   U23  3192B AB 17.05.2012 24116/1/0                              0.00 C I015          1201 0015 SMITH, Aaron
                ......                        ......... ......... .........
         Total  183                          42481.77   6929.34 -35552.43
Enter OPTION, <F1>=help....:_____          (PHD.PBSOL,M)
<D#>=details, <E#>=edit/remove, <H#>=Hold, <P>=Print/Display, <X>=Export
<up>/<down>=page, <esc>=exit
```

If you select "C" for Claim List View in field 3, an example report is shown below.

```
Pharmhos Software Pty Ltd                              Port:scottmnb/2      10:02:17 19 Feb 2013
  1:Rx No OR Appr No:HS027J        2.Type:A   3.View:C   4.Status:*
  5.Period:1201   OR 6.Date From:        7.Date To:
    Serial Script No  Patient Name Medication       Claim Amt  Claim Period R Reason
    1    U2 24081/1/0  MORRISON, S> METHADONE 10mg TABL>   0.00      1201 J R142
    2    U3 24084/1/0  MORRISON, S> METRONIDAZOLE 400mg>   0.00      1201 U I635
    3    U4 24089/1/0  MORRISON, S> PREDNISOLONE 5mg TA>   0.00      1201 U W043,I635
    4    U5 24089/2/0  MORRISON, S> AMOXYCILLIN 500mg C>   0.00      1201 J R978,R062
    5    U6 24090/1/0  MORRISON, S> PREDNISOLONE 5mg TA>   0.00      1201 U W043,I635
    6    U11 24101/1/0 MORRISON, S> PREDNISOLONE 5mg TA>   0.00      1201 U W043,I635
    7    U13 24107/1/0 MORRISON, S> PREDNISOLONE 25mg T>   0.00      1201 J R978,R062
    8    U14 24108/1/0 MORRISON, S> AMOXYCILLIN 500mg C>   0.00      1201 J R978,R062
    9    U15 24108/2/0 MORRISON, S> METRONIDAZOLE 400mg>             1201 C I015
    10   U15 24108/2/0 MORRISON, S> METRONIDAZOLE 400mg>             1201 C I015
    11   A16 c 24109/1/0 MORRISON, S> ZOLEDRONIC ACID 4mg>           1201 C
    12   17 24111/1/0  NGUYEN, Hai  cocaine           28.81      1201 S W095,W101
    13   U18 24111/1/1 NGUYEN, Hai  cocaine           28.81      1201 X R978,R403
    14   A19 24115/1/0 NGUYEN, Hai  ADALIMUMAB 40mg/0.8>  1738.96  1201 S W095,W101,
    15   U23 24116/1/0 SMITH, Aaro> IBUPROFEN 400mg TAB>            1201 C I015
                                                   .........
         Total                                    42481.77
Enter OPTION, <F1>=help....:_____          (PHD.PBSOL,M)
<D#>=details, <E#>=edit/remove, <H#>=Hold, <P>=Print/Display, <X>=Export
<up>/<down>=page, <esc>=exit
```

Several functions can then be performed from this screen – at the Option Line:

- To view details of a script: press D and the line number e.g. D26
- To edit a script: press E and the line number e.g. E26
- To place a script on hold: press H and the line number e.g. H26
- Print/Display a report: press P
- Export a report to Excel: press X

"D#" – Details

- Enter **D** and the line number required and a detailed prescription window will open. This window is a display only and no data can be entered here. If the item has been issued with a reason code from Medicare, further details are outlined.

```
────────── PBS Online - Script Details (1) ──────────
Patient
UR No.:123456 - DOB:15/09/1964
MORRISON, Scott
C/- Pharmhos Software 63-85 Turner Street 63-85 Turner Street
PORT MELBOURNE 3207
Medication
PREDNISOLONE 5mg TABLETS
RxNo: 24101/1/0  Original  1917X  Qty: 60
Written:04/05/2012  Dispensed:15/10/2012  Claim Period:1201
Cost$:1.57  PtChrg$11.55  Claim$0.00  Paid$:0.00  Net$:9.98
PBS Online Status: U    - Reason Codes:W043,I635
Reason Code Details
Reason Code - 043 - WARNING - Description -
The prescriber number was not provided.
Fix Instructions -
1. The prescriber number must be in the format 0000001-9999999 with no blanks. 2. Check that the prescriber
number on the paper prescription match the details provided in your claim. If the prescriber number is not
Option.:_____
<UP> / <DOWN> to scroll  <ESC>=exit
```

"E#" – Edit/Remove

- Enter **E** and the line number required and a warning message will appear. If **Y** is selected, the dispensing screen will open and details of the prescription may be edited.

```
──────────── Message ────────────
EDIT 24081/1/0 MORRISON, Sc METHADONE 10mg TABLETS Confirm<Y/N>
```

To Reclaim a script you must use the prompt W in the Dispense Screen. This will generate a new serial number

---

"H" – Hold

- Enter **H** and the line number required and a warning message will appear. If **Y** is selected, the prescription will be placed on Hold and not submitted to Medicare with the current claim. The status code will become an X.

```
──────────────── Message ────────────────
On Hold  24084/1/0 MORRISON, Sc METRONIDAZOLE 400mg TA Confirm<Y/
```

"P" – Print/Display

- Enter **P** and the following message will appear.

```
──────────────── Message ────────────────
Print or Dispay the Report <Y>=yes
```

- If **Y** is selected, the following Print Option message will appear.
-

```
──────────────── Select Print Option ────────────────
CHOOSE OUTPUT from one of the following:
The print Q is set for..:LASER, LASER-P, DEFAULTH, PH-LABELS
Enter <P>rint, <D>isplay, <S>lave, <ESC>=exit..:  ____
```

- If **P** is selected, a Printer/FormQ Assignment box similar to the following will open with site specific printers. To select the appropriate printer, arrow through the list and select **Enter** to print.

```
──────── Printer/FormQ Assignment ────────
Laser Printer (LASER)
Laser Printer (portrait) (LASER-P)
Default system printer (Hold (DEFAULTH)
Default Label Printer (PH-LABELS)
```

- If **D** is selected, the current view will appear in a Display screen like the following. To scroll through each page, use the **Return** or **Enter** key; select **Esc** to escape.

```
PHD.PBSOL        PBS Online - Transaction Details   19/02/2013 10:44                    Page   1
Script OR Appr No:HS027J  Pay Type:A  View:C  Status:*  Period:1201  Date From:  Date To:
-------------------------------------------------------------------------------------------------
Serial Script No   Patient Name Medication       Claim Amt  Claim Period R Reason

    U2 24081/1/0   MORRISON, S> METHADONE 10mg TABL>    0.00      1201 J R142
    U3 24084/1/0   MORRISON, S> METRONIDAZOLE 400mg>    0.00      1201 U I635
    U4 24089/1/0   MORRISON, S> PREDNISOLONE 5mg TA>    0.00      1201 U W043,I635
    U5 24089/2/0   MORRISON, S> AMOXYCILLIN 500mg C>    0.00      1201 J R978,R062
    U6 24090/1/0   MORRISON, S> PREDNISOLONE 5mg TA>    0.00      1201 U W043,I635
   U11 24101/1/0   MORRISON, S> PREDNISOLONE 5mg TA>    0.00      1201 U W043,I635
   U13 24107/1/0   MORRISON, S> PREDNISOLONE 25mg T>    0.00      1201 J R978,R062
   U14 24108/1/0   MORRISON, S> AMOXYCILLIN 500mg C>    0.00      1201 J R978,R062
   U15 24108/2/0   MORRISON, S> METRONIDAZOLE 400mg>              1201 C I015
   U15 24108/2/0   MORRISON, S> METRONIDAZOLE 400mg>              1201 C I015
  A16 c 24109/1/0  MORRISON, S> ZOLEDRONIC ACID 4mg>              1201 C
    17 24111/1/0   NGUYEN, Hai  cocaine            28.81      1201 S W095,W101
   U18 24111/1/1   NGUYEN, Hai  cocaine            28.81      1201 X R978,R403
  A19 24115/1/0    NGUYEN, Hai  ADALIMUMAB 40mg/0.8>  1738.96    1201 S W095,W101,
   U23 24116/1/0   SMITH, Aaro> IBUPROFEN 400mg TAB>              1201 C I015
   U24 24117/1/0   SMITH, Aaro> PARACETAMOL 500mg T>    0.00      1201 U I635,I594
-------------------------------------------------------------------------------------------------
-- <RTN>=next page, <any char.>=exit
```

"X" – Export

- Enter **X** and a message will appear with the export drive destination. Check the details are correct and press **Enter** for the data to be exported to Excel.

```
         Export - drive:\dir..\dir..\filename.ext
c:\merlin\PHD.PBSOL_20130219_1046_HS027J.txt_____
<ESC>=exit
```

Below is an example of the exported data in Excel. Make sure a blank Excel worksheet is open before you export the report from Merlin.

	A	B	C	D	E	F	G	H	I
1	---								
2	PHD.PBSOL PBS Online - Transaction Details 19/02/2013 10:49								
3	Script OR Appr No:HS027J Pay Type:A View:C Status:* Period:1201 Date From: Date To:								
4	---								
5	Serial	Script No	Patient Name	Medication	Claim Amt	Claim Period	R	Reason	
6	---								
7	U2	24081/1/0	MORRISON, S>	METHADONE 10mg TABL>	0	1201	J	R142	
8	U3	24084/1/0	MORRISON, S>	METRONIDAZOLE 400mg>	0	1201	U	I635	
9	U4	24089/1/0	MORRISON, S>	PREDNISOLONE 5mg TA>	0	1201	U	W043,I635	
10	U5	24089/2/0	MORRISON, S>	AMOXYCILLIN 500mg C>	0	1201	J	R978,R062	
11	U6	24090/1/0	MORRISON, S>	PREDNISOLONE 5mg TA>	0	1201	U	W043,I635	
12	U11	24101/1/0	MORRISON, S>	PREDNISOLONE 5mg TA>	0	1201	U	W043,I635	
13	U13	24107/1/0	MORRISON, S>	PREDNISOLONE 25mg T>	0	1201	J	R978,R062	
14	U14	24108/1/0	MORRISON, S>	AMOXYCILLIN 500mg C>	0	1201	J	R978,R062	
15	U15	24108/2/0	MORRISON, S>	METRONIDAZOLE 400mg>		1201	C	I015	
16	U15	24108/2/0	MORRISON, S>	METRONIDAZOLE 400mg>		1201	C	I015	
17	A16 c	24109/1/0	MORRISON, S>	ZOLEDRONIC ACID 4mg>		1201	C		
18		17 24111/1/0	NGUYEN, Hai	cocaine	28.81	1201	S	W095,W101	
19	U18	24111/1/1	NGUYEN, Hai	cocaine	28.81	1201	X	R978,R403	
20	A19	24115/1/0	NGUYEN, Hai	ADALIMUMAB 40mg/0.8>	1738.96	1201	S	W095,W101,W150	
21	U23	24116/1/0	SMITH, Aaro>	IBUPROFEN 400mg TAB>		1201	C	I015	
22	U24	24117/1/0	SMITH, Aaro>	PARACETAMOL 500mg T>	0	1201	U	I635,I594	
23	U25	24120/1/0	MORRISON, S>	CARBAMAZEPINE 100mg>	0	1201	U	I635	
24	U27	24122/1/0	MORRISON, S>	CARBAMAZEPINE 100mg>	0	1201	U	I635	
25	U28	24123/1/0	MORRISON, S>	CARBAMAZEPINE 100mg>	0	1201	U	I635	

phd.pbsol_20130219_1046_hs027j

10.8. PBS Online Claim Closing Procedure

The following claim closing procedure was developed in response to interest from sites for a guide to use in the new PBS Online environment. It is a suggestive process only; you may wish to develop your own steps.

It is best to complete this process before closing the claim period in order to maximize the number of claimable scripts accepted for payment within the period.

NOTE:
- Hospital pharmacies must close their claim period and open a new claim period every month, or sooner.
- No more than 3,500 prescriptions are allowed in a claim period.

Step 1: *Fix Items with a Problem*

NOTE: This should be done regularly and also just prior to closing the claim.

Open the transaction details screen (*see section 10.7*), and for the status selection in field 4, select '*I*' for script <u>items with a problem</u>. This will compile a list of any prescriptions:

- That have been rejected (status), along with reason codes and fix instructions
- That are stuck *waiting* to be sent (status)
- That are unable to be cancelled (status)

To see full details of the reason codes associated with each script, use the details prompt (<D#>=details) from the option line. For instance, if the script was on line number 2, you'd need to type d2, followed by ENTER. In the details screen, you will be given detailed reasons and fix instructions. To close this screen and return to the transaction details screen, press ESC.

From the transaction details screen, you can jump directly to the dispensing screen to enable editing of a prescription. Type '*e#*' into the option line followed by enter. For example, e3 for line number 3.

If a prescription has been rejected via PBS online and you want to reclaim it, instead of filing it from the dispensing screen, you must enter '*w*' to re-serialise it.

If a script has been rejected and then reclaimed successfully, the initial entry will change from a status of 'R' for rejected, to 'C' for cancelled. The serial numbers will be retained against the entry and can be seen in a full list or if you view a '*cancelled*' list.

Step 2: *Sort Script Bundle*

To create a list of prescriptions that you need to check, open the transaction details screen and in field 4, select '*O*' in the status field for '*Ok to place in script bundle*'.

This list will include all prescriptions with the status of (*accepted*).

This list can be printed using Print/Display from the option line. Alternatively, this list can be exported to an excel spreadsheet by typing '*X*' from the option line and selecting a file path on which to save the report to.

NOTE: There is no need to use a 'cancelled' script report as this list provided all the required scripts to be in the package and cancelled serial numbers can be identified by typing in the script number in PBSOLT zoom (field 1).

If there are prescriptions that appear in the claim but you cannot locate the physical script, there are 2 options.

- *Option 1* – Cancel the prescription from the claim by terminating or deleting the dispensing. This is not usually a feasible option as the stock has been supplied and full payment not received.
- *Option 2* – Place the prescription '*On hold*'. This process removes the script from the current claim without affecting the dispensing record. However, it does not reclaim the item automatically in the next claim. This is handled in the PBSOLT screen using the following steps:
  - Generate the final claim list using ZOOM: PBSOLT
  - Filter for <*>All
  - The view (field 3) must be set to F for Financial View to see the script totals. (This cannot be seen in the <C> Claim View setting)
  - Use this list to identify any script(s) which needs to be withheld from the current claim
  - At the option line press <H>followed by the line number to withhold a script from the claim.
  - Placing a script on hold will remove it from the 'Ok to place in script bundle'.

To display any prescriptions placed on hold, you can use the transaction details screen to display a list of prescriptions with the status of ' – *on hold*'. Each prescription needs to be re-serialised once you are ready to re-claim the item, using the '*w*' feature from the dispensing screen. To track any prescriptions '*on hold*', open the transaction details screen and in field 4, choose . You can choose to jump to the dispensing screen to edit them from here.

Sample 'OK TO PLACE IN SCRIPT BUNDLE' Report

```
----------------------------------------------------------------------------------------------------
----------------------
PHD.PBSOL          PBS Online - Transaction Details   12/03/2013 09:37
Page   1
Script OR Appr No:HS027J  Pay Type:A  View:F  Status:O  Period:  Date From:01/10/2012  Date To:24/01/2013
----------------------------------------------------------------------------------------------------
----------------------
Serial T   Item Mfr  Dispensed Script No   Est Rebate Act Rebate Difference R Reason        Prd ClmRef
Patient Name
----------------------------------------------------------------------------------------------------
----------------------
  100   8262W  SW 17.10.2012 24269/2/0       44.38      34.62      -9.76 A                  1201   0133
SMITH, Mary
  101   8895E  PF 17.10.2012 24270/1/0        5.57       2.90      -2.67 A                  1201   0134
SMITH, Mary
  105   8519J  GK 17.10.2012 24271/2/0       43.14      33.67      -9.47 A                  1201   0138
SMITH, Mary
  107   1445C  AF 17.10.2012 24271/4/0      113.16     106.26      -6.90 A                  1201   0140
SMITH, Mary
 A111 C 4613T     17.10.2012 24273/1/0     3626.97    3627.53       0.56 A W150            1201   0144
SMITH, Mary
  112 C 4327R     17.10.2012 24273/2/0       26.45      27.01       0.56 A                  1201   0145
SMITH, Mary
  113 C 4361M     17.10.2012 24273/3/0       24.73      34.87      10.14 A                  1201   0146
SMITH, Mary
  117   3404E  AP 28.11.2012 24302/1/0       26.60      14.01     -12.59 A                  1201   0156
BRONSON, Charles
       ------                            ---------- ---------- ----------
SubTot     8                               3911.00    3880.87     -30.13

  C38   2746M  NV 12.11.2012 24287/1/0       14.75      14.95       0.20 A W101            1201   0151
NGUYEN, Hai
       ------                            ---------- ---------- ----------
SubTot     1                                 14.75      14.95       0.20

  R12   4405W  GK 28.11.2012 24303/1/0        7.32      10.32       3.00 A                  1201   0157
SPINAPOLICE, Monica
  R13   4405W  GK 28.11.2012 24313/1/0        7.32      10.32       3.00 A                  1201   0161
SPINAPOLICE, Monica
       ------                            ---------- ---------- ----------
 Total    11                               3940.40    3916.46     -23.94
```

Step 3: *Close the Claim*

If, after all these steps have been completed, you are ready to close the claim. As with paper claiming, closing an Online PBS claim resets all serial number counters and the period number for the PBS approval number of the site.

- Use ZOOM: PBSOL > Select Option 4 - 'Close Current Period'

```
━━━━━━━━━━━ PBS Online Menu (4) ━━━━━━━━━━━
  1. PBS Online - Transaction Details
  2. PBS Online - Statement Details
  3. PBS Online - Reconciliation Report
  4. PBS Online - Close Current Period
  5. PBS Online - Electronic Certification
  6. PBS Online - Manual Statement Request
  7. PBS Online - Reason Codes
  8. PBS Online - Message logs
```

The data required in these fields should default to the correct information, but they can be overridden.
- Field 1: Enter the PBS approval number for the pharmacy;
- Field 2 is the claim period that is being closed. Accept the default claim period (should default to current period)
- The start and end date are not required; nor is the claim run log.

```
━━━━━━ PBS Online - Close Current Period (0) ━━━━━━
***** PBS ONLINE - CLOSE A PERIOD PROCESSING *****
END OF PERIOD PROCESSING FOR A PBS APPROVAL NUMBER
This Process will RESET all SERIAL NUMBER counters
and PERIOD NUMBER for this PBS APPROVAL No.
This Process can be run ONCE only for EACH PERIOD.
No Dispensing can occur while this is in progress.

1:PBS Approval Number .: HS027J
2:Required period .....: 1201

   Start Date...........: 21/03/2012 12:29
   End Date.............:

   Claim Run Log .......:

Option.:F_____
<F>=Run Process, <ESC>=Exit
```

- From the option line, enter **"F"** to run the process of closing the claim.

```
━━━━━━ Message ━━━━━━
PBS Period Rollover for 06773L Period 0909 - Confirm <Y/N> _
```

- When the above message appears, confirm by entering **"Y"** for Yes.
- Once the process is complete, the final message reads: ***Processing & Update Complete – PBS ready for use.***
- A new claim period will automatically open. The new claim period will be the closed claim period PLUS 1 i.e. if the closed claim period is 0908, the new claim period is 0909.
  - The claim period number should state how many claims have been submitted so far in a calendar year. E.g. the 6th claim submitted by an approved pharmacy in 2010 should have a claim period of 1006.

NOTE: There is no paperwork that automatically prints out as a result of closing the claim.

STEP 4: *Electronically Certify the claim*

Claiims must be certified electronically by an authorised person.

- Use ZOOM: PBSOL > Select Option 5 - 'Electronic Certification'
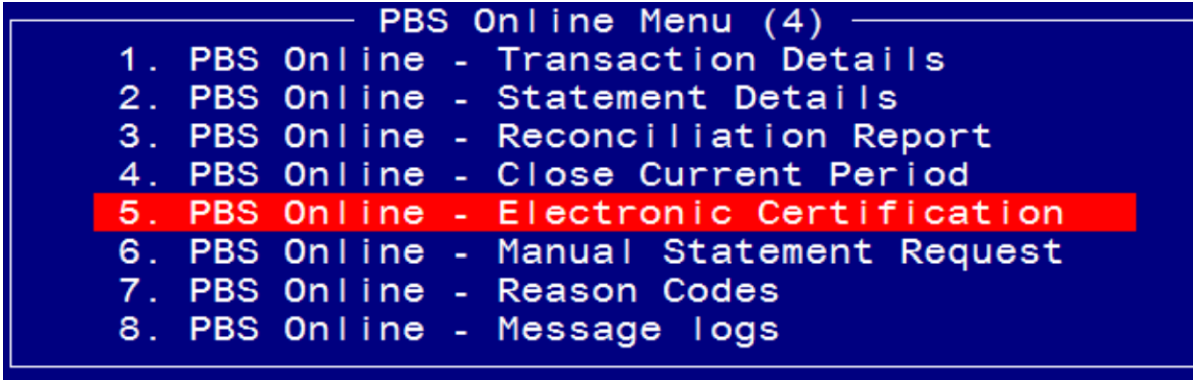
- Enter the pharmacy PBS Approval Number and Claim period.
- Enter your username and password
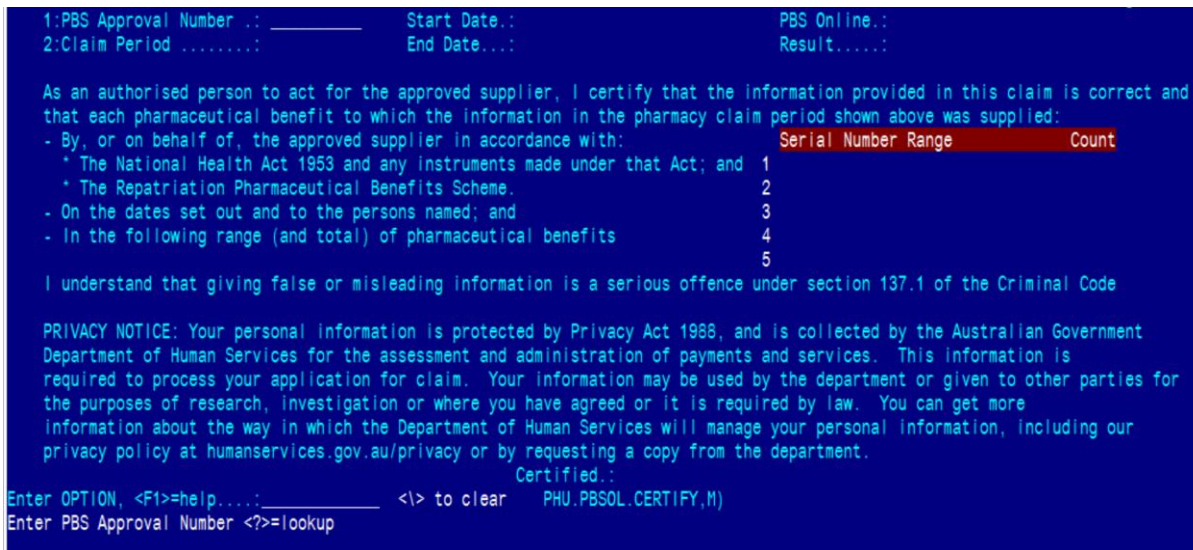
STEP 5: *Bundle Prescriptions & Complete Medicare Paperwork*

Once you have closed the claim period and signed the electronic certification, bundle all prescriptions up:
- by patient category i.e. prescriptions separated into 4 bundles –(C)oncessional, (G)eneral, (E)ntitlement, and (R)epatriation. Note: Doctor's bag orders should be in a separate bundle
- in ascending order i.e. prescriptions in each bundle should be in serial number order, with serial number 1 at the top of the bundle.

There is no summary printout for script totals – use the process below to identify script totals.
- Regenerate the final claim list using ZOOM: PBSOLT
- Filter for <O>K to Send (as above)

- The view (field 3) must be set to F for Financial View to see the script totals. (This cannot be seen in the <C> Claim View setting)
- Use this list to ascertain subtotals for each script type (C, G, R, E) and the number sequencing – enter these details on the Medicare Claim for Payment form.

STEP 6: *Store prescription paperwork for claim period*

- You need to keep all prescriptions and claim-related paperwork for 2 years for audits and verifications.
- You can keep records in electronic or paper form.

10.9. Payments from Medicare

Payments for claims processed through Online Claiming for PBS will be made directly into your institution/pharmacy authority's bank account. The pharmacy would have already registered their bank account details with Medicare using the 'Notification of hospital authority bank account details' form when setting up PBS claiming.'

10.9.1. How frequently are payments made?

Payments are made weekly.
- Each Friday the details of any payments due for disbursement are sent to the Reserve Bank of Australia (RBA).
- The money will then be deposited into your bank account soon after.
- Any delay between deposits to the RBA and when the deposit appears in your bank account will depend on the financial institution/bank.
- The maximum delay is generally 3 days, however most financial institutions process these deposits overnight.

NOTE:
Payments made are subject to a payment lag:
- When you dispense a PBS prescription and it is approved by Medicare for payment, there is a lag time before payment for that prescription will occur.
- This can take between 2-9 days.
- Once the payment lag has expired, you will be paid for the prescription on the following FRIDAY.

10.9.2. How will I know when a payment has been made into my bank account?

Medicare will send you a '**Payment Advice**' several days after a payment has been made.

NOTE: Merlin also store payment information to identify which prescriptions have and have not received a payment within a claim period. This can be viewed in the 'PBS Online – Statement Details Report' (Refer to Section 10.11.1).

Medicare will not be responsible for delays or errors in payment due to factors outside the reasonable control of Medicare, such as delays in the banking system.

If the electronic funds transfer (EFT) payment is returned to Medicare, Medicare will reprocess the payment upon receipt of the correct bank account details.

If notified of an overpayment by Medicare, the institution/pharmacy agrees to repay Medicare any payments credited in error.

10.9.3. Payment Advice Statement

You will receive a payment advice from Medicare after each deposit is made into your bank account. These statements will be sent to you in the mail.

The payment advice is separated by the following details:
- Claim Period Number
- PBS Payment ID
- Payment category (Concessional, General, Entitlement, Repatriation, Doctor's Bag) description
- Relevance Amounts and Totals, including:
  - subtotals for payents for each claim period; and
  - grand total for all payments for that payment advice

Deposits made into your bank account should be equal to the total for each payment advice.

IMPORTANT: a Payment Advice may contain payments relating to MORE than one claim period.

10.9.3.1. PBS Payment IDs

PBS Payment IDs are assigned to each payment request that is sent to the payment system by the processing system. This is done on a daily basis, meaning that only PBS scripts that are processed by Medicare on that day will have the same PBS Payment ID. Furthermore, there will be several PBS payment IDs on a single payment advice.
Each PBS payment ID on the payment advice will have a corresponding claim period number (the claim period number is listed on the far left column of the payment advice). This number allows you to see which claim period each payment relates to.

If you would like to identify which prescriptions relate to each PBS Payment ID listed on the payment advice, you will be able to view this in the 'PBS Online – Statement Details Report' (Refer to Section 10.11.1).

Sample Payment Advice Statement:

10.10. Reconciliation of Payments

As you will be paid weekly, you will not receive the whole payment for a claim period at once – payments for a claim period will be made over the weeks of the claim period. As a result, it is not possible to complete a final reconciliation of payments for the whole claim period until the claim period has been closed and the final electronic statement details for that claim period have been retrieved by Merlin.

PBS payment processing can take between 2-9 days payment occurs each Friday; the task of collecting statement details is scheduled for the following Tuesday (as a scheduled task set to run in Merlin for each site or approval number). If you choose to do so, you will be able to reconcile payments that have been made to date throughout an open claim period by the various reports in Merlin.

The pharmacy will receive a PBS Reconciliation Statement after a claim period has been processed (Refer to Section 10.10.1 Reconciliation Statements). The various reports in Merlin can be used to aid with the payment reconciliation process. Refer to Section 10.11. – Merlin PBS-Online Reports.

From the Medicare website for a 'Guide to Reconciling Statements':

A Guide to Reconciling Your PBS Statements

Payment Correspondence		PBS Reconciliation Statement
1) All the General Benefits amounts combined (on the Payment Advice)	=	**GEN** (under Total of PBS Rebate on the Prescription Summary)
2) All the Entitlement (free) Benefits amounts combined (on the Payment Advice)	=	**ENT (FREE)** (under Total of PBS Rebate on the Prescription Summary)
3) All the Concessional Benefits amounts combined (on the Payment Advice)	=	**CON** (under Total of PBS Rebate on Prescription Summary)
4) All the Repatriation Benefits amounts combined (on the Payment Advice)	=	**RPBS** (under Total of PBS Rebate on the Prescription Summary)

5)   Doctor's Bag amounts
(on the Payment Advice)
=
DBOF figures for the same PBS Payment ID.
(on the Recipient Created Tax Invoice)

6) Grand total incl GST (all Payment IDs)
(on the Recipient Created Tax Invoice)

        minus   =   **DBOF**

        GST
(on the Recipient Created Tax Invoice)

7)   Grand total (all Payment IDs)
(on the Payment Advice)

        minus   =   **Total of PBS Rebate**
(under Total of PBS Rebate on the Prescription Summary)

        GST
(on the Recipient Created Tax Invoice)

Note: The Dispense Price in the Prescription Details section of the PBS Reconciliation Statement includes patient contributions where applicable.
Use the Payment ID to determine which statements can be reconciled.
Several Prescription Summaries may reconcile to one Payment Advice.

10.10.1. Reconciliation Statements

The pharmacy will receive a PBS Reconciliation Statement after a claim period has been processed. It contains:
- Prescription Summary report, including Adjustments to claims outside of this claim period
- Prescription Details report, which provides details of each prescription supplied in this claim period and reasons for non-payment if indicated
- PBS Entitlement Errors report, which provides a list of expired Medicare card and Concession card for patients who have had their prescription in this claim period.
- Explanation of Reason Codes listing

If a PBS prescription is rejected, it can be amended and resubmitted. Resubmitted prescriptions must be given a new serial number and included in a subsequent claim period. Refer to Section 10.4.5 – Transfer a Prescription to the Next Claim Period.

Refer to the Medicare Website for sample 'Mock-ups of new PBS Reconciliation Statements'.

10.11. Merlin PBS-Online Reports

Merlin will obtain statement details electronically from Medicare that contain the detailed prescription information for each weekly payment and each claim period. The task of collecting statement details is scheduled for the following Tuesday (as a scheduled task set to run in Merlin for each site or approval number). Using this electronic data, Merlin will produce a number of reports to assist you with reconciling your PBS payments. These reports include:

- Statement Detailed Report
- PBS Reconciliation Report
- Payment Validation Report

10.11.1. PBS Online – Statement Details Report

- The statement details report is generated by a scheduled task set to run in Merlin for each site (or approval number).
- A statement details report displays information for a pay period.
- The information includes a line-by-line reference of each prescription paid by the Reserve Bank on behalf of Medicare.
- PBS payment processing can take between 2-9 days and payment occurs each Friday; the task of collecting statement details is scheduled for the following Tuesday.

From the PBS Online Menu – choose option 2. Statement Details
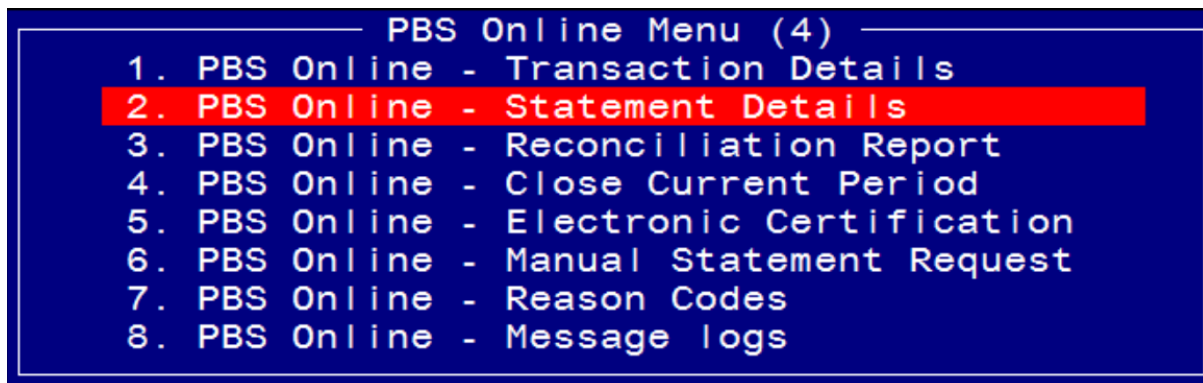
To view the statement details, the following information is required:

- **Field 1:** Enter the Pharmacy's PBS approval number e.g. HS027J

- **Field 2:** Filter Option – select Script type (G,C,E,R,B) or press <A> to include all script types:
  - o **G** for General
  - o **E** for Entitled
  - o **C** for Concession
  - o **R** for Repatriation
  - o **B** for Doctors Bag

- **Field 3:** View Option – This field dictates what information is displayed.
  - o **"F"** will provide a Full report:
    - ▪ this will display all scripts for the selected period or date range.
  - o **"E"** will display Exceptions only:
    - ▪ this will display scripts where the difference between the estimated rebate and actual rebate is greater than or equal to the variance value.
  - o **"W"** will provide a Weekly payment report.
    - ▪ this will display all scripts for the selected date range ONLY

- **Field 4** – Variance:
  - o The variance allowed for the report will default to $5.00 (dollars). This can be amended to any value.
  - o Based on the variance value entered, line detail displayed will be filtered to reflect this.
  - o To get the most beneficial view using the variance option, ensure the view selected is **E** for an Exceptions only report.
    - ▪ For instance, a variance between estimated rebate and actual rebate of 50 cents is probably not relevant to the business. However, a variance of $20 may be of more interest.

- **Field 5 -** Status: Filter Option – select which items to display (e.g. rejections only) or press <*> to include all scripts regardless of status.
  - o ***** for All scripts
  - o **"R"** for Rejected scripts
  - o **"A"** for Financial Adjustment
  - o **"X"** for Removed from claim
  - o **"P"** for Payment requested

- **Field 6 :** Enter PBS claim period (e.g. 1007). Note: if 'W' is selected in Field 3-View, the PBS claim period field cannot be used.
OR
- **Field 7& 8:** Enter date range

The report automatically appears on the screen.
Below is an example of the Statement Report set to 'F' – Full report

MERLIN

```
Pharmhos Software Pty Ltd                              Port:scottmnb/2    11:12:15 19 Feb 2013
  1:Appr No:06773L        2.Type:A   3.View:F   4.Variance:5.00    5.Status:*        29/06/2010 11:10:1  Complete
  6.Period:0908   OR  7.Date From:          8.Date To:
    Serial   Item fr  Dispensed Script No   Est Rebate Act Rebate Difference R Reason    PBS Paymt Id Bank Ref No Adjustment
  1      1 08263X SW 06.07.2009 23324/1/0        57.37     57.37      0.00 P             100000115217 450001139751     57.37
  2      2 02179Q GK 06.07.2009 23325/1/0                   0.00      0.00 X I015        100000115217 450001139751   -129.99
  3                                                                        P             100000115217 450001139751    129.99
  4      3 01638F BX 06.07.2009 23326/1/0         5.05      0.00     -5.05 R R280                                       0.00
  5      4 02179Q GK 06.07.2009 23325/1/0                   0.00      0.00 X I015        100000115297 450001139805   -121.33
  6                                                                        P             100000115217 450001139751    121.33
  7      5 02179Q GK 06.07.2009 23325/1/0       129.99    129.99      0.00 P             100000115297 450001139805    129.99
  8      6 08558K SW 07.07.2009 23327/1/0        71.41     71.41      0.00 P             100000115297 450001139805    71.41
  9        ------                              --------- ---                                                        ----------
 10 SubTot    6                                  263.82                                                               258.77
 11
 12     E1 08270G LY 06.07.2009 23315/1/0        20.38                                                                 20.38
 13     E2 01567L SI 06.07.2009 23316/1/0        21.48     21.48      0.00 P             100000115202 450001139740     21.48
 14                                                                        P             100000115202 450001139740    -21.48
 15                                                                        P             100000115202 450001139740     21.48
        ------                              --------- --------- ---------                                         ----------
    Total   22                                  488.76    483.74     -5.02                                            483.74
Enter OPTION, <F1>=help....:_____          (PHD.PBSOL.STMT,M)
<D#>=details, <P>=Print, <X>=Export
<up>/<down>=page, <esc>=exit
```

> 'Complete' indicates that all PBS transactions have been processed and paid by Medicare. If the status is 'Interim', then there are transactions still awaiting Medicare processing and payment.

Below is an example of the Statement Report set to 'W' – Weekly payment report

```
Pharmhos Software Pty Ltd                              Port:scottmnb/2    11:15:46 19 Feb 2013
  1:Appr No:06773L        2.Type:A   3.View:W   4.Variance:5.00    5.Status:*        Weekly payment report
  6.Period:      OR  7.Date From:01/07/2009 8.Date To:07/07/2009
    Bank RefNo   PBS PaymtId  Per Serial  Item Mf  Dispensed Script No  Est Rebate Act Rebate Difference R Reason   Adjustment
  1 450001037556 100000114957 0905   E18 1978D SI 01.07.2009 23309/1/0      17.44     17.44      0.00 P W125         17.44
  2              ----------                                               --------- --------- ---------            ----------
  3    SubTot            1                                                   17.44     17.44      0.00               17.44
  4
  5 450001037611 100000115031 0905   E19 2487X SI 02.07.2009 23310/1/0      16.98     16.98      0.00 P W125         16.98
  6                                                                         16.98     16.98      0.00 P W125        -16.98
  7                                                                         16.98     16.98      0.00 P W125         16.98
  8                                                                         16.98     16.98      0.00 P W125        -16.98
  9                                                                         16.98     16.98      0.00 P W125         16.98
 10                                                                         16.98     16.98      0.00 P W125        -16.98
 11                                                                         16.98     16.98      0.00 P W125         16.98
 12                                                                         16.98     16.98      0.00 P W125        -16.98
 13                                                                         16.98     16.98      0.00 P W125         16.98
 14                                                                         16.98     16.98      0.00 P W125        -16.98
 15                                                                         16.98     16.98      0.00 P W125         16.98
        ----------                                                        --------- --------- ---------            ----------
    Total    32                                                            636.96    778.72    141.76              606.81
Enter OPTION, <F1>=help....:_____          (PHD.PBSOL.STMT,M)
<D#>=details, <P>=Print, <X>=Export
<up>/<down>=page, <esc>=exit
```

Below is an example of the Statement Report set to 'E' – Exception report

```
Pharmhos Software Pty Ltd                                Port:scottmnb/2    11:18:34 19 Feb 2013
 1:Appr No:06773L       2.Type:A   3.View:E   4.Variance:5.00    5.Status:*      29/06/2010 11:10:16 Complete
 6.Period:0908   OR 7.Date From:        8.Date To:
  Serial  Item fr  Dispensed Script No   Est Rebate Act Rebate Difference R Reason   PBS Paymt Id  Bank Ref No Adjustment
 1     3 01638F BX 06.07.2009 23326/1/0      5.05      0.00     -5.05 R R280                                     0.00
 2     ......                              .......... .......... ..........                              ..........
 3 SubTot    1                               5.05      0.00     -5.05                                           0.00
 4
 5
 6
 7
 8
 9
10
11
12
13
14
15
       ......                              .......... .......... ..........                              ..........
    Total    1                               5.05      0.00     -5.05                                           0.00
Enter OPTION, <F1>=help....:_____         (PHD.PBSOL.STMT,M)
<D#>=details, <P>=Print, <X>=Export
<up>/<down>=page, <esc>=exit
```

Several functions can then be performed from this screen – at the Option Line:

- **"D#"** will provide further details

```
                                                 — PBS Online - Script Details (1) —
Patient
UR No.:012374 - DOB:
HUNTER, Timothy


Medication
TICARCILLIN-CLAVULANIC ACID 3g-100mg INJECTION
RxNo: 23325/1/0  Original  2179Q  Qty: 10
Written:06/07/2009  Dispensed:06/07/2009  Claim Period:0908
Cost$:0.00  PtChrg$0.00  Claim$0.00  Paid$:121.33  Net$:121.33
PBS Online Status: P
```

- **"P"** will prompt you to either print or display the report. You need to select **"Y"** for Yes.

```
..................................................................................................
PHD.PBSOL.STMT     PBS Online - Statement Details   (29/06/2010 11:10:16 Complete)      Run: 19/02/2013 11:3  Page    1
Script OR Appr No:06773L  Pay Type:A  View:F  Variance:5.00  Status:*  Period:0908  Date From:  Date To:

..................................................................................................
Serial   Item fr  Dispensed Script No    Est Rebate Act Rebate Difference R Reason     PBS Paymt Id  Bank Ref No Adjustment
..................................................................................................
    1 08263X SW 06.07.2009 23324/1/0       57.37      57.37      0.00 P          100000115217 450001139751     57.37
    2 02179Q GK 06.07.2009 23325/1/0                   0.00      0.00 X 1015     100000115217 450001139751   -129.99
                                                                       P          100000115217 450001139751    129.99
    3 01638F BX 06.07.2009 23326/1/0        5.05       0.00     -5.05 R R280                                    0.00
    4 02179Q GK 06.07.2009 23325/1/0                   0.00      0.00 X 1015     100000115297 450001139805   -121.33
                                                                       P          100000115217 450001139751    121.33
    5 02179Q GK 06.07.2009 23325/1/0      129.99     129.99      0.00 P          100000115297 450001139805    129.99
    6 08558K SW 07.07.2009 23327/1/0       71.41      71.41      0.00 P          100000115297 450001139805     71.41
      .......                             .......... .......... ..........                                  ..........
SubTot    6                               263.82     258.77     -5.05                                          258.77

   E1 08270G LY 06.07.2009 23315/1/0       20.38      20.38      0.00 P          100000115202 450001139740     20.38
   E2 01567L SI 06.07.2009 23316/1/0       21.48      21.48      0.00 P          100000115202 450001139740     21.48
                                                                       P          100000115202 450001139740    -21.48
                                                                       P          100000115202 450001139740     21.48
   E3 01393H SC 06.07.2009 23317/1/0                   0.00      0.00 X 1015     100000115202 450001139740    -17.23
..................................................................................................
-- <RTN>=next page, <any char.>=exit
```

- **"X"** will export the file to an Excel document.
  - An export path is displayed – check to make sure the path is valid.
  - Once completed, the .txt file should be available in the designated directory.
  - Open a blank excel spreadsheet. Drag the *.txt file into the blank grids in the blank excel spreadsheet.
  - The data is now in Excel for viewing/extrapolation.

Below is an example of the exported data in Excel. Make sure a blank Excel worksheet is open before you export the report from Merlin.

PHD.PBSOL.STMT   PBS Online - Statement Details   (08/07/2009 16:10:17 Complete)   Run: 19/04/2010 15:05
Script OR Appr No:06773L Pay Type:A View:F Variance:0.00 Status:* Period:0908 Date From: Date To:

Serial	Item	Mfr	Dispensed	Script No	Est Rebate	Act Rebate	Difference	R	Reason	PBS Paymt Id	Bank Ref No	Adjustment
1	08263X	SW	06.07.2009	23324/1/0	57.37	57.37	0	P		100000115217	450001040244	57.37
2	02179Q	GK	06.07.2009	23325/1/0		0	0	X	I015	100000115217	450001040244	-129.99
								P		100000115217	450001040244	129.99
5	02179Q	GK	06.07.2009	23325/1/0	129.99	129.99	0	P		100000115297	450001040859	129.99
SubTot	6				263.82	258.77	-5.05					258.77
E1	08270G	LY	06.07.2009	23315/1/0	20.38	20.38	0	P		100000115202	450001040233	20.38
E2	01567L	SI	06.07.2009	23316/1/0	21.48	21.48	0	P		100000115202	450001040233	21.48
								P		100000115202	450001040233	-21.48
								P		100000115202	450001040233	21.48
E5	01978D	SI	07.07.2009	23328/1/0	17.44	17.44	0	P		100000115297	450001040859	17.44
SubTot	5				74.79	74.8	0.01					74.8
C1	08270G	LY	06.07.2009	23318/1/0	15.08	15.08	0	P		100000115202	450001040233	15.08
C2	01567L	SI	06.07.2009	23319/1/0		0	0	X	I015	100000115217	450001040244	-16.18
								P		100000115217	450001040244	16.18
C3	01393H	SC	06.07.2009	23320/1/0	11.93	11.93	0	P		100000115217	450001040244	11.93
								P		100000115217	450001040244	-11.93
								P		100000115217	450001040244	11.93
SubTot	5				72.51	72.52	0.01					72.52
RE1	08270G	LY	06.07.2009	23314/1/0		0	0	X	I015	100000115297	450001040859	-20.38
								P	W125	100000115202	450001040233	20.38
R2	08270G	LY	06.07.2009	23321/1/0	15.08	15.08	0	P		100000115217	450001040244	15.08
R4	02834E	CH	06.07.2009	23323/1/0	24.9	24.9	0	P		100000115217	450001040244	24.9
								P		100000115217	450001040244	-24.9
								P		100000115217	450001040244	24.9
R6	02012X	CH	07.07.2009	23330/1/0	27.47	27.47	0	P		100000115297	450001040859	27.47
SubTot	6				77.64	77.65	0.01					77.65
Total	22				488.76	483.74	-5.02					483.74

10.11.2. PBS Reconciliation Report

The PBS Reconciliation report details payments for a claim period, for each patient category aligned with a Reserve Bank Reference number (BRef) under which payment was made, and a PBS Payment ID number.

For example: BRef 450001040233 A Reserve Bank payment reference number (BRef)
                     100000115202 A PBS Payment ID number

This report can be used to reconcile with the Payment Advice Statement received from Medicare.

From the PBS Online menu, choose option 3. PBS Online – Reconciliation Report
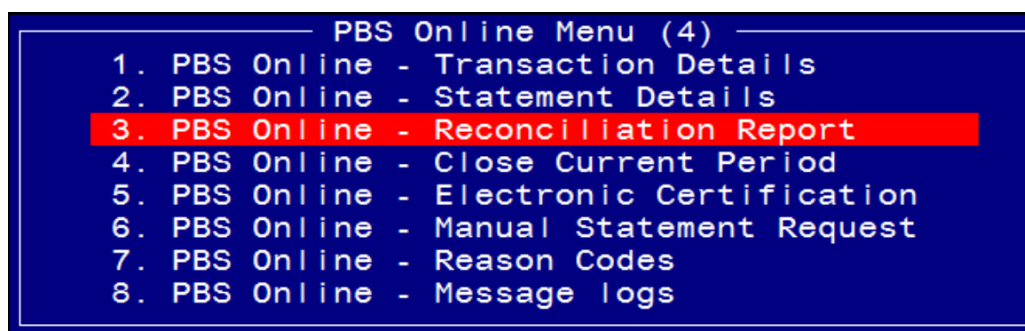
```
┌──────── PBS Online Menu (4) ────────┐
   1. PBS Online - Transaction Details
   2. PBS Online - Statement Details
   3. PBS Online - Reconciliation Report
   4. PBS Online - Close Current Period
   5. PBS Online - Electronic Certification
   6. PBS Online - Manual Statement Request
   7. PBS Online - Reason Codes
   8. PBS Online - Message logs
```

To view the statement details, the following information is required:

- **Field 1:** Enter the Pharmacy's PBS approval number e.g. HS027J
- **Field 2:** Enter PBS claim period (e.g. 1007).
- **Field 3 -** Type**:** View Option – This field dictates what information is displayed.
    - **Normal** will provide a report of all scripts reimbursed by PBS online
    - **Under Co-Pay** (DO NOT SELECT THIS OPTION – not functional)

With these details, a report is compiled.

Below is an example of the PBS Reconciliation Report set to 'Normal'.

- Subtotals are created for each claim category (eg General, Entitled) by Reserve Bank Reference (BRef).

Several functions can then be performed from this screen – at the Option Line:

- **"P"** will prompt you to either print or display the report. You need to select **"Y"** for Yes.

```
PHD.PBSOL.SUM     PBS Online - Reconciliation Report (29/06/2010 11:10:16 Complete)     Run: 19/02/2013 12:4  Page    1
Appr No:06773L  Period:0908

  PBS Payment ID  Gen      Gen $  Ent       Ent $  Con     Con $  DVA      DVA $  Bag      Bag $     Gst  Tot    Total $

BRef 450001139740
     100000115202              7     57.36    1     15.08    1     20.38                          0.00    9      92.82
                   ----------- ----  ---------- ----  ---------- ----  ---------- ---- ---------- ----  ---------- ----  ----------
          SubTot  0     0.00    7     57.36    1     15.08    1     20.38    0     0.00    0.00    9      92.82

BRef 450001139751
     100000115217  4   178.70               6     27.47    7     50.18                          0.00   17     256.35
                   ----------- ----  ---------- ----  ---------- ----  ---------- ---- ---------- ----  ---------- ----  ----------
          SubTot  4   178.70    0     0.00    6     27.47    7     50.18    0     0.00    0.00   17     256.35

BRef 450001139805
     100000115297  3    80.07    1     17.44    1     29.97    2      7.09                          0.00    7     134.57
                   ----------- ----  ---------- ----  ---------- ----  ---------- ---- ---------- ----  ---------- ----  ----------
          SubTot  3    80.07    1     17.44    1     29.97    2      7.09    0     0.00    0.00    7     134.57


                   ----------- ----  ---------- ----  ---------- ----  ---------- ---- ---------- ----  ---------- ----  ----------

-- <RTN>=next page, <any char.>=exit
```

- **"X"** will export the file to an Excel document. A similar spreadsheet to *transaction details* is produced.
  - An export path is displayed – check to make sure the path is valid.
  - Once completed, the .txt file should be available in the designated directory.
  - Open a blank excel spreadsheet. Drag the *.txt file into the blank grids in the blank excel spreadsheet.
  - The data is now in Excel for viewing/extrapolation.

Below is an example of the exported data in Excel. Make sure a blank Excel worksheet is open before you export the report from Merlin.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	--																				
2	PHD.PBSOL.SUM PBS Online - Reconciliation Report (29/06/2010 11:10:16 Complete) Run: 19/02/2013 12:44																				
3	Appr No:06773L Period:0908																				
4	--																				
5	PBS Paym	Gen	Gen $	Ent	Ent $	Con	Con $	DVA	DVA $	Bag	Bag $	Gst	Tot	Total $							
6																					
7	BRef 450001139740																				
8	1E+11				7	57.36	1	15.08	1	20.38			0	9	92.82						
9			----	----------	----	----------	----	----------	----	----------	----	----------	----------	----	----------						
10	SubT	0	0	7	57.36	1	15.08	1	20.38	0	0	0	9	92.82							
11																					
12	BRef 450001139751																				
13	1E+11	4	178.7			6	27.47	7	50.18			0	17	256.35							
14			----		----------	----	----------	----	----------	----	----------	----------	----	----------							
15	SubT	4	178.7	0	0	6	27.47	7	50.18	0	0	0	17	256.35							
16																					
17	BRef 450001139805																				
18	1E+11	3	80.07	1	17.44	1	29.97	2	7.09			0	7	134.57							
19			----	----------	----	----------	----	----------	----	----------	----	----------	----------	----	----------						
20	SubT	3	80.07	1	17.44	1	29.97	2	7.09	0	0	0	7	134.57							
21																					
22			----	----------	----	----------	----	----------	----	----------	----	----------	----------	----	----------						
23	Tota	7	258.77	8	74.8	8	72.52	10	77.65	0	0	0	33	483.74							
24																					
25																					

phd.pbsol.sum_20130219_1243_067

10.11.3. Payment Validation Report

- An alternative to a PBS Reconciliation Report is the Payment Validation Report (PVR).
- This report can be used to reconcile with the Payment Advice Statement received from Medicare.

NOTE: This report is not an option on the PBS Online menu; this report is a scheduled task set to run regularly.

To run the "Payment Validation Report", the Posh Report Processing Screen is used. This screen can be accessed by the zoom "[REPORT".

```
┌──────── Posh Report Processing (1) ────────┐
 1:Report Id.:PHR.PBSOL.PVR.XML
   Report Name:PBS Online Payment Validation Report
   Inputs                 4.Values
 1 Task ID...................: PHR.PBSOL.PVR
 2 User Id...................: HAI
 3 PBS Approval Number.......: 06773L
 4 Claim Period..............: 0908
 5 File to Write to..........: POSH.FTP
 6
 7
 8
 9
10
11
12
13
14

Option.:R_____
<R>=Run report <ESC>=exit <#.#>=file.line
```

- Enter the zoom [REPORT
- Enter ? in Field 1 and a list of all availabel reports will appear.
- Select PHR.PBSOL.PVR.XML i.e. PBS Online Payment Validation Report
- Field 4.2: Enter User Id
- Field 4.3: Enter the Start Date
- Field 4.4: Enter the End Date
- Field 4.5 Enter the Main Store Id OR leave blank and all sites will be included in the report
- Type <R> in the Option Line to run the report
- When it has finished, escape out of the screen and enter the zoom [EXPORT. The following screen will open:
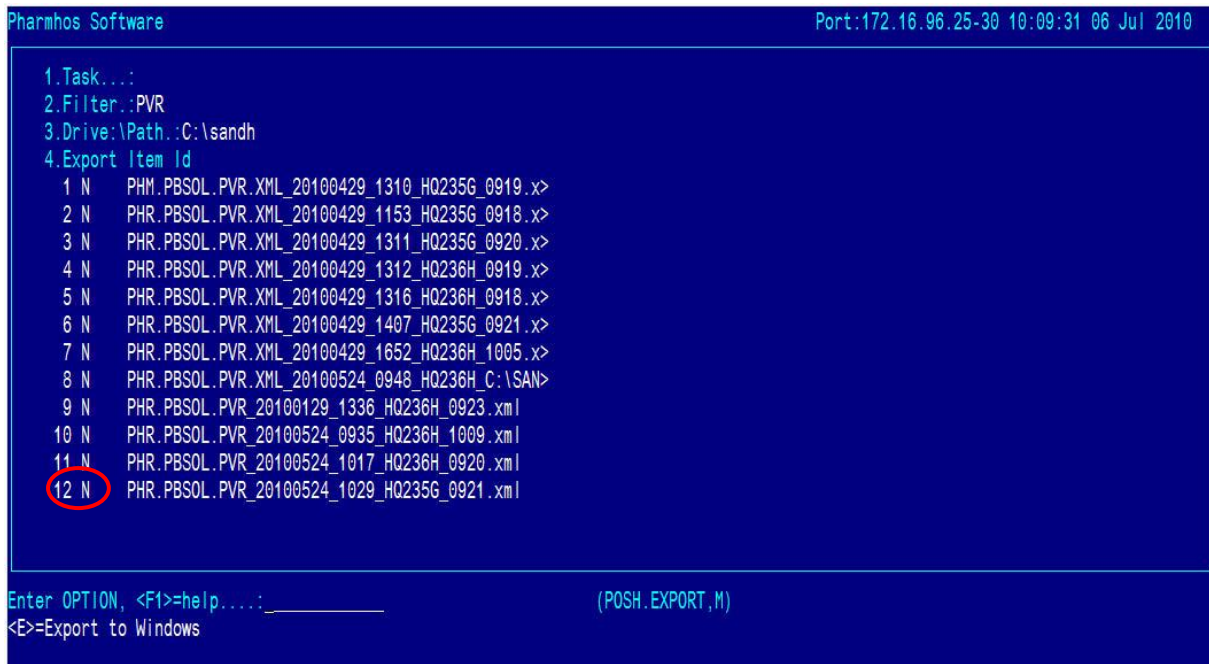
Complete the fields as follows:
- Field 1: Leave blank (Nothing needs to be entered in this field)
- Field 2: Enter PVR (must be in capitals)(for Payment Validation Report) to filter the results
- Field 3: Enter the path for the report to be exported to – this must be a drive on the computer that will allow you to export to
- Field 4 should populate automatically. To choose which report(s) you wish to export, at the option line, type the reference for the report : e.g. 4.6 (i.e. line 6 of Field 4) The 'N' next to the report will change to 'Y'. You can select multiple reports to export at once.
- Type <E> for Export at the Option Line and <Y> when the box opens.
- The report will now be exported to the folder specified in EXCEL format (.xls) to the designated directory; you may need to go to the drive you saved the file into to open it.

The report can be exported to a local drive when required and opened in Excel as a spreadsheet.
The Payment Validation Report includes the following tabs:

- **Claim Analysis**

This details the estimated rebate for each patient category.

Claim Analysis Report							
Approval No. HS027J							
Claim Period 0923			23/01/2010 18:01:46 Interim				
	Gen	Con	Ent	RPBS	DBOF	Sub Total	GST	Total
Total Number of Scripts	742	802	1847	516	0			3907
Merlin Est. Total	86345.01	41980.03	117574.03	18534.09	0.00	264433.16		264433.16

- **Statement Analysis**

This details the actual rebate current as at a specified date. The report will remain *interim* until the claim period is closed at which time the report becomes *complete*.

Statement Analysis Report							
Approval No. HS027J							
Claim Period 0923			23/01/2010 18:01:46 Interim				
	Gen	Con	Ent	RPBS	DBOF	Sub Total	GST	Total
Total Script Transactions	799	873	2007	548	0			4227
Total Scripts (inc cancelled)	758	824	1930	529	0			4041
Total Number of Scripts	758	824	1928	529	0			4039
Total Amount Paid	86087.73	41843.09	117491.63	18393.72	0.00	263816.17		263816.17

- **Bank Deposit**

This details dates, Reserve Bank account reference numbers, and the dollar value of each payment.

Bank Deposit Summary Report					
Approval No.	HS027J				
Claim Period	0923		23/01/2010 18:01:46 Interim		
Date of Deposit	Reserve Bank (RBA) Number	Total Deposited Amount	Other Claim Period Amt	This Claim Period Amt	
31/12/2009	470000170416	132255.63	-1409.92	133665.55	
08/01/2010	400000094883	102472.22	-4941.23	107413.45	
15/01/2010	420000079492	122794.57	116094.95	6699.62	
22/01/2010	470000225631	175732.71	175485.65	247.06	
				248025.68	

- **Discrepancies Report**

This details any differences between estimated and actual rebate.

Discrepancy Report								
Approval No.	HS027J							
Claim Period	0923			23/01/2010 18:01:46 Interim				
Serial No	Item	Brand	Description	Date Disp	Script No	Est Rebate	Act Rebate	Difference
A2	06363X	AN	PEGFILGRASTIM 6mg/0.6mL SYRINGE	17.12.2009	414283/1/0	1892.10	1938.52	46.42
A111	06371H	NV	ZOLEDRONIC ACID 4mg/5mL INJECTIC	18.12.2009	415365/1/1	417.10	378.34	-38.76
A114	06448J	SH	INFLIXIMAB 100mg INJECTION	18.12.2009	389508/1/1	2973.90	3100.60	126.70
E218	08510X	SW	ENOXAPARIN SODIUM 40mg(4000I.U.a	29.10.2009	388695/1/0	15.64	16.42	0.78
E232	01356J	HH	TOBRAMYCIN 80mg/2mL INJECTION	13.12.2009	412165/1/0	22.24	23.02	0.78
C215	01010E	RC	ASPIRIN DISPERSIBLE 300mg DISPEF	28.12.2009	419058/1/0	21.99	3.29	-18.70
C271	03198H	AF	IBUPROFEN 200mg TABLETS	19.12.2009	415806/1/0	0.00	6.76	6.76
AR63	000000		TAMSULOSIN 0.4mg TABLETS	21.12.2009	416306/1/0	51.55	0.00	-51.55
AR547	000000		CEFTAZIDIME 1g INJECTION	29.12.2009	419330/1/0	100.67	85.20	-15.47
R550	01629R	AF	METHYLDOPA 250mg TABLETS	28.12.2009	419029/1/0	0.00	8.35	8.35
Total						5495.19	5560.50	65.31

- **Non-transmitted Script Report**

This details any prescriptions with a status of **W**.

Non Transmitted Scripts Report						
Approval No.	HS027J					
Claim Period	0923			23/01/2010 18:01:46 Interim		
Serial No	Item	Brand	Description	Date Disp	Script No	Est Rebate
141	1638F	HH	METRONIDAZOLE 500mg/100mL INJECTI	09.04.2009	285468/1/0	0.00
864	1785Y	SZ	CEFTRIAXONE 2g INJECTION	31.12.2009	420610/1/0	0.00
AE112	6291D	AN	FILGRASTIM 300mcg/0.5mL SYRINGE	18.12.2009	415444/1/0	0.00
E117	8238N	PU	IPRATROPIUM 500mcg/mL (30) NEBULES	21.12.2009	416344/1/0	0.00
E252	1466E	HH	HEPARIN SODIUM (PBS) 5000units/0.2mL	16.12.2009	414205/1/0	15.48
C1937	8729K	HH	GRANISETRON 3mg/3mL INJECTION	28.12.2009	396874/1/2	32.55
C2009	2072C	AP	BUDESONIDE 400mcg (200dose) TURBUH	29.12.2009	419491/1/1	0.00
AC2020	8757X	MK	EZETIMIBE 10mg TABLETS	30.12.2009	419701/1/1	0.00
AR63	00000		TAMSULOSIN 0.4mg TABLETS	21.12.2009	416306/1/0	51.55
AR144	00000		TAMSULOSIN 0.4mg TABLETS	23.12.2009	416306/1/1	51.65
RE147	2844Q	FM	WARFARIN (MAREVAN) 3mg TABLETS	07.12.2009	409184/2/0	12.69
Total						163.93

- **Rejected Scripts**

This details a valued list of rejected prescriptions, aligned with a relevant reason code
Scripts **Rejected Initially** are those that appear as Rejected through PBS Online.

Rejected Scripts Report							
Approval No.	HS027J						
Claim Period			923 25/09/2010 18:04:06 Interim				
Serial No	Item	Brand	Description	Date Disp	Script No	Est Rebate	Reason Code(s)
Rejected Initially							
R439	7530H	DA	CODEINE APF 25mg/5mL LINCTUS	28.08.2010	549793/3/0	2.63	R142
C1088	8558K	SW	ENOXAPARIN SODIUM 20mg(2000I.U.anti-	02.09.2010	552387/1/0	28.35	R541
Rejected in Statements							
A491	9514R	AN	PEGFILGRASTIM 6mg/0.6mL SYRINGE	24.09.2010	564845/2/1	1891.70	R140
444	1525G	HH	FLUCLOXACILLIN 1g INJECTION	05.09.2010	553898/1/0	1.60	R066,R144
276	2981X	PF	METHYLPREDNISOLONE SOD.SUCC. 40r	25.08.2010	547487/1/0	2.33	R031
Total						1926.61	

- **Scripts not in Statement**

This details any item that appears on the transaction screen but not on the statement screen. This allows the user to ensure nothing is missed.

Scripts Not in Statement							
Approval No.	HS027J						
Claim Period			923 02/10/2010 18:04:41 Interim				
Serial No	Item	Brand	Description	Date Disp	Script No	Est Rebate	Reason Code(s)
C1	3119E	SZ	CEPHALEXIN 500mg CAPSULES	01.10.2010	568265/1/0	5.37	R541
C2	8455B	GX	TRAMADOL 50mg CAPSULES	01.10.2010	568265/2/0	3.76	R541
C23	2622B	SI	OXYCODONE (ENDONE) 5mg TABLETS	14.09.2010	558898/6/0	6.90	R541
DE84	8521L	PF	ATORVASTATIN 80mg TABLETS	03.10.2010	569264/1/1	105.32	
R107	2642C	NV	POTASSIUM CHLORIDE 600mg SR TABLE	17.09.2010	561139/1/0	4.32	
R108	2281C	BX	GLUCOSE-SODIUM CHLORIDE (PBS) 4%-	15.09.2010	559710/2/0	18.12	
R109	8262W	SW	ENOXAPARIN SODIUM 60mg(6000I.U.anti-	20.09.2010	562168/1/0	34.03	
104	8600P	AP	ESOMEPRAZOLE 20mg TABLETS	17.09.2010	561076/7/0	0.06	
E85	2175L	FM	THYROXINE SODIUM 100mcg TABLETS	20.09.2010	562518/1/0	9.96	
E86	2174K	FM	THYROXINE SODIUM 50mcg TABLETS	20.09.2010	562522/1/0	11.23	
AR114	00000		ENSURE PUDDING VANILLA 113G CONT.	04.10.2010	569519/1/0	76.35	
C195	2964B	HH	CEFALOTIN 1g INJECTION	21.09.2010	562729/1/0	12.51	
C196	1510L		HYDROCORTISONE SODIUM SUCCINATE	21.09.2010	562729/2/0	26.77	
Total						314.69	

10.12. PBS Online – Manual Statement Request

This process sends a request via PBS Online to retrieve the requested statement for a particular claim period if available, for up to a maximum of 2 years. The duplicate statement will be retrieved by Merlin in the same manner as the original statement and will contain the same data as the original statement, plus any additional data if the Status of the original Statement is 'incomplete' or 'interim'.

Note: This process will obtain electronic data for that claim period from Medicare and rebuild the Statement Detailed screen, meaning that it will take some time for all data to be available again in the Statement Detailed screen.

- From the PBS Online menu, choose option 6. PBS Online – Manual Statement Request

```
┌──────── PBS Online Menu (4) ────────┐
│   1. PBS Online - Transaction Details │
│   2. PBS Online - Statement Details   │
│   3. PBS Online - Reconciliation Report │
│   4. PBS Online - Close Current Period │
│   5. PBS Online - Electronic Certification │
│   6. PBS Online - Manual Statement Request │
│   7. PBS Online - Reason Codes        │
│   8. PBS Online - Message logs        │
└─────────────────────────────────────┘
```
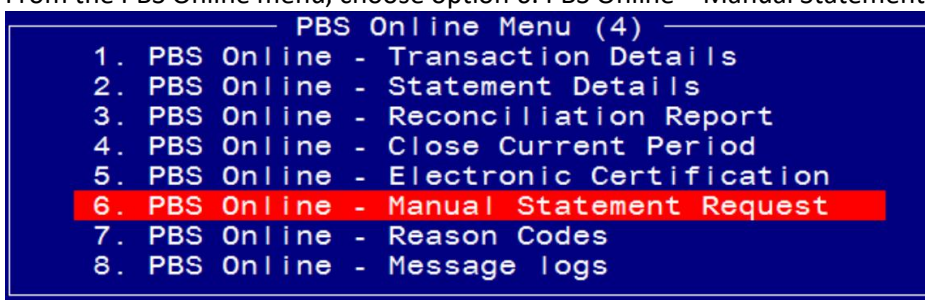
- Enter into field 1 & 2 respectively, the PBS approval number and the claim period that the statement is required for.
- Again, these details will default to the last closed claim.
- The rest of the fields are display only, and do not require any data input.

```
┌───────────── PBS Online - Statements (0) ─────────────
***** PBS Online - Statement Request *****

This process sends a request via PBS Online to
retrieve the requested statement if available.


1:PBS Approval Number .: 06773L      Opened:
2:Required period .....: 0908        Closed:08/07/2009 15:40


  Last Requested Date..: 29/06/2010 11:48:49
  Last Processed Date..: 29/06/2010 11:10:16
  Last Status..........: Complete
  Last update log......: 08/07/2009 15:40 SM0

Option.:F_____
<F>=Run Process, <ESC>=Exit
```

'Complete' indicates that all PBS transactions have been processed and paid by Medicare. If the status is 'Interim', then there are transactions still awaiting Medicare processing and payment.

- From the option line, enter **"F"** to run the process. When the following message appears, confirm by entering **"Y"** for Yes.

```
┌─────────────────── Message ───────────────────
─Statement Request for 06773L Period 0908 - Confirm <Y/N> ─
```

- The following message should then appear at the top of the screen:
    PHT.PBSOL.MSG: Sending statement request for (06773L/0908)

10.13. Additional PBS Reports

There are 2 additional reports that are generated using the available Merlin data. These are:
- NHS Statistics Report
- PBS Period Post-Process Profit/Loss Report
-

10.13.1. NHS Statistics Report

The NHS Statitistics Report is a summary of Dispense trading for each patient category for a particular date range/PBS claim period.

NOTE: This report can be used to display the daily dispense trading.

```
────────────────── NHS Statistics (0) ──────────────────
   Summary Statistics for Pharmaceutical Benefit
   Scheme. Simply enter the data required.

   1.Enter start date...:  _____
   2.Enter end date.....:
          --- OR ---
   3.Enter PBS Period...:
                                        Claim Opened
   4.Enter PBS App. No..:                Claim Closed
   5.Patient Category.   1
                         2
                         3
                         4

   6.NonPBS Breakdown...:
Option.:
Enter the start date of this report
```
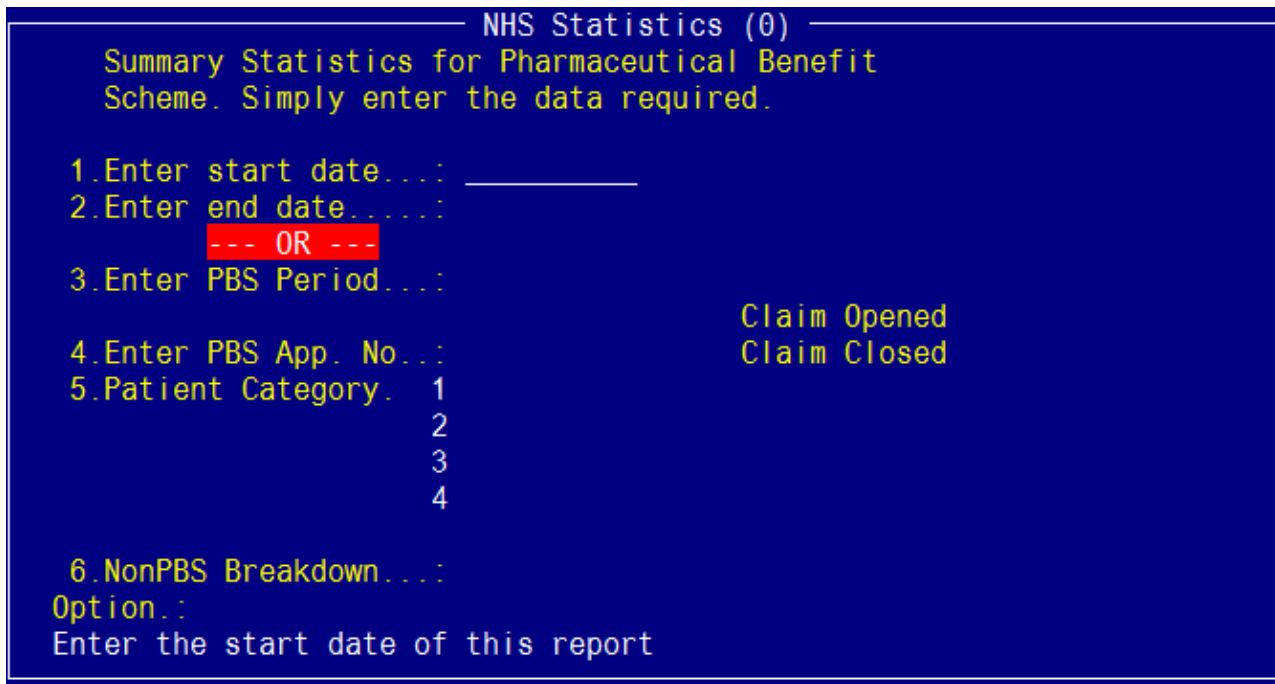
To navigate to this screen:
Dispense → 6.Reports →11.NHS Statistics Report

Field 1	Enter start date	Enter the start date of this report.
Field 2	Enter end date	Enter end date for this report.
Field 3	Enter PBS Period	Enter PBS Period. The maximum length of this field is 4 characters.
Field 4	Enter PBS App. No	Enter the PBS Approval Number, <?>=lookup.
Field 5	Patient Category	Enter the Patient Category required (if applicable). A standard look-up is permitted on this field. This is a paging (multi-line) field.
Field 6	NonPBS Breakdown	<Y>es, show breakdown of NonPBS NonS100 items by Patient Category. The default value is N. Acceptable values are: N, Y.

```
PHR.NHSSTATS              Summary Statistics for Pharmaceutical Benefit Scheme        13 Mar 2013 10:26 Page  1
                      Date from 12/01/2013 to 13/03/2013 for PBS Approval No. (HS027J)

                No    No    Patient   Rebate Owing    Owing     Sales      Base   Incentive    Gross      %
                Pt    Rx    Contrib          Rx      Rebate     Value     Price   Payments    Profit     GP

General PBS      1    12    214.30   175.34    0      0.00     389.64     28.94      0.00     360.70    92.6
Entitled         0     0      0.00     0.00    0      0.00       0.00      0.00      0.00       0.00     0.0
Concession       0     3     17.50    56.81    0      0.00      74.31     15.15      0.00      59.16    79.6
Repatriation     0     0      0.00     0.00    0      0.00       0.00      0.00      0.00       0.00     0.0
Doctors Bag      0     0      0.00     0.00    0      0.00       0.00      0.00      0.00       0.00     0.0
Safety Net       0     0      0.00     0.00    0      0.00       0.00      0.00      0.00       0.00     0.0

PBS Totals       1    15    231.80   232.15    0      0.00     463.95     44.09      0.00     419.86    90.5

Non PBS (Non S100)  2   2    10.45     0.00    0      0.00      10.45     14.92      0.00      -4.47   -42.8
Non PBS (S100)   0     0      0.00     0.00    0      0.00       0.00      0.00      0.00       0.00     0.0

Grand Total      3    17    242.25   232.15    0      0.00     474.40     59.01      0.00     415.39    87.6


-- <RTN>=next page, <any char.>=exit
```
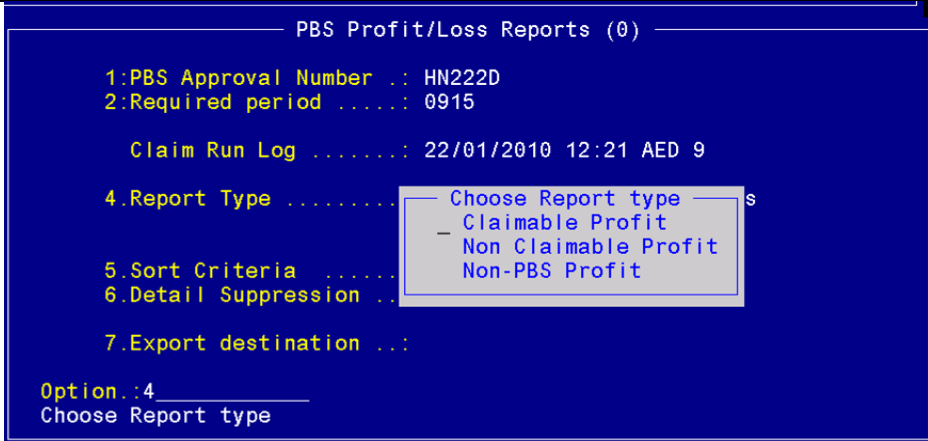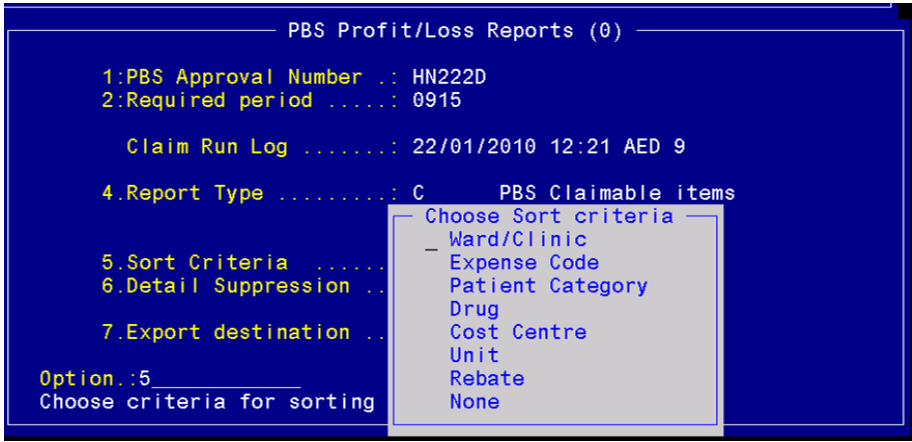
10.13.2. PBS Period Post-Process Profit/Loss Report

This screen is used to generate a detailed report on claimable items, including cost, charge, rebate and profit. This can be run for both CTS and online claims.

To navigate to this screen:
Dispense → 7. Specialised Facilities → 2. PBS Claim Processing Menu → 2. PBS Claim via Floppy Disk Menu → 5. PBS Period Post-Process Profit / Loss Reports

Field	Field Name	Action & Notes
Field 1	**PBS Appr. No**	Enter PBS Approval Number or use the <?>=lookup and select from the list.
Field 2	**Required period**	Enter the Period required as <YYNN>=Period No. (YY=year eg 94 NN=Claim No.) or <?>=Lookup.
Field 3	**Claim Run Log**	No data can be entered into this field, as it is display only. This field contains the date, time and user who last completed this process.
Field 4	**Report Type**	The choices are: <C>laimable Profit, <S> Non-Claimable Profit, <N>on-PBS Profit. Choose Report type. The default value is C.

<table>
<tr><td colspan="3">

```
┌──────────────── PBS Profit/Loss Reports (0) ─────────────────┐
│                                                              │
│    1:PBS Approval Number .: HN222D                           │
│    2:Required period .....: 0915                             │
│                                                              │
│       Claim Run Log .......: 22/01/2010 12:21 AED 9          │
│                                                              │
│    4.Report Type .........┌─ Choose Report type ──┐s         │
│                           │ _  Claimable Profit    │          │
│                           │    Non Claimable Profit│          │
│    5.Sort Criteria  ......│    Non-PBS Profit      │          │
│    6.Detail Suppression ..└────────────────────────┘          │
│                                                              │
│    7.Export destination ..:                                  │
│                                                              │
│  Option.:4_____                                        │
│  Choose Report type                                          │
└──────────────────────────────────────────────────────────────┘
```

</td></tr>
</table>

Field 5	**Sort Criteria**	The choices are: <W>ard Clinic, <E>expense Code, <P>atient Category, <D>rug, <C>ost Centre, <U>nit,<R>rebate, <N>one.

```
┌──────────────── PBS Profit/Loss Reports (0) ─────────────────┐
│                                                              │
│    1:PBS Approval Number .: HN222D                           │
│    2:Required period .....: 0915                             │
│                                                              │
│       Claim Run Log .......: 22/01/2010 12:21 AED 9          │
│                                                              │
│    4.Report Type .........: C      PBS Claimable items       │
│                           ┌─ Choose Sort criteria ─┐          │
│                           │ _  Ward/Clinic          │          │
│    5.Sort Criteria  ......│    Expense Code         │          │
│    6.Detail Suppression ..│    Patient Category     │          │
│                           │    Drug                 │          │
│    7.Export destination ..│    Cost Centre          │          │
│                           │    Unit                 │          │
│  Option.:5_____     │    Rebate               │          │
│  Choose criteria for sortin│   None                 │          │
│                           └─────────────────────────┘          │
└──────────────────────────────────────────────────────────────┘
```

Field 6	**Detail Suppression**	Enter S or N to indicate whether to suppress detail on the report or not.
Field 7	**Export destination**	Enter the file path if you wish to export the report e.g. c:\pharmhos\reports, default=c: The default value is c:\pharmhos\reports.

Type "E" to export or "P" to print the reports at the Option line.

If **E** is selected:

- An export path is displayed – check to make sure the path is valid.
- Once completed, the .txt file should be available in the designated directory.
- Open a blank excel spreadsheet. Drag the *.txt file into the blank grids in the blank excel spreadsheet.
- The data is now in Excel for viewing/extrapolation.

Sample Report Type: PBS Claimable Items

PHR.PBSPROFIT   Post Process Profit report (PBS Claim items) 13 Mar 2013 13:52

PBS Approval No. HS027J Claim Period 1101

Serial	Date	Period	Script#	Description	Qty	NHS		N	Cost	Charge	Rebate	Profit
A38	3/02/2012	1101	24033/1/0	ddd	500	13Q		N	0	34.2	0.16	34.36
R76	20/01/2012	1101	24005/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.33	5.6	2.84	7.11
AR75	17/01/2012	1101	24002/1/0	TESTOSTERONE 50mg/5g (1%) 30 GEL	1	8830R		N	78.75	5.6	77.73	4.58
R74	13/12/2011	1101	23997/1/0	CARBOPLATIN 450mg/45mL INJ	2	1162E			77.9	5.6	243.32	171.02
A34	1/12/2011	1101	23986/1/0	LAMIVUDINE 100mg TB	56	5770Q		H	0	34.2	264.52	298.72
22	14/10/2011	1101	23927/1/0	FLUOROURACIL [VPBS] 1mg INF	1000	7239B		H	0	34.2	48.95	83.15
21	14/10/2011	1101	23926/1/0	ETOPOSIDE [VPBS] 1mg INF	50	7232P			0	34.2	40.97	75.17
AR70	14/10/2011	1101	23925/1/1	BLEOMYCIN [VPBS] 1iu (1microg) INF	30000	4433H		H	0	0	195.34	195.34
AR69	14/10/2011	1101	23925/1/0	BLEOMYCIN [VPBS] 1iu (1microg) INF	30000	4433H		H	0	5.6	189.74	195.34
AR68	14/10/2011	1101	23924/1/0	CETUXIMAB [VPBS] 1mg INF	880	4312Y		H	0	5.6	3103.4	3109
A9	13/10/2011	1101	23882/1/0	ABCIXIMAB 10mg/5mL INJ	3	8048N		N	1347.81	34.2	1433.55	119.94
R51	30/08/2011	1101	23843/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	5.6	2.84	7.08
C5	23/08/2011	1101	23839/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	5.6	2.84	7.08
R45	19/08/2011	1101	23835/1/0	ATORVASTATIN 40mg TB	30	8215J		N	66.03	5.6	73.45	13.02
AR40	15/08/2011	1101	23829/1/0	CAPTOPRIL 25mg TB	90		0		3.35	5.6	0.83	3.08
AR38	16/06/2011	1101	23815/1/0	NEBIVOLOL 1.25mg TB	56	9316H		N	0	5.4	45.22	50.62
R34	10/06/2011	1101	23811/1/0	ASPIRIN 300mg DISPTAB	96	1010E		N	1.84	5.4	3.1	6.66
R21	7/06/2011	1101	23804/1/0	ROXITHROMYCIN 300mg TB	5	8016X		N	2.09	5.4	6.09	9.4
R20	3/06/2011	1101	23803/1/0	AMOXYCILLIN 500mg (SAS) CP	20	1889K		N	0	5.4	5.05	10.45
R6	24/05/2011	1101	23787/2/0	AMOXYCILLIN 500mg (SAS) CP	20	1889K		N	0	0	10.45	10.45
R3	24/05/2011	1101	23787/1/0	ATORVASTATIN 40mg TB	22	8215J		N	48.42	5.4	60.89	17.86
R2	24/05/2011	1101	23786/1/0	AMOXYCILLIN 500mg (SAS) CP	20	1889K		N	0	5.4	5.05	10.45
									---------	--------	--------	---------
Grand	Totals								1630.25	253.8	5816.32	4439.88

Sample Report Type: PBS Non-Claimable Items

PHR.PBSPROFIT   Post Process Profit report (PBS Non-Claim items) 13 Mar 2013 14:12

PBS Approval No. HS027J Claim Period 1101

Serial	Date	Period	Script#	Description	Qty	NHS		N	Cost	Charge	Rebate	Profit
S/Net	24/02/2012	1101	24054/1/0	AMOXYCILLIN 250mg CP	15	1884E		N	1	5.6	-5.51	-0.91
S/Net	6/02/2012	1101	24047/1/0	AMOXYCILLIN 1g TB	14	8581P		N	7.01	5.6	-1.87	-3.28
S/Net	3/02/2012	1101	24042/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.33	5.6	-3.78	0.49
S/Net	1/02/2012	1101	24021/1/0	ddddd	100	13Q		N	0	19.1	-8.29	10.81
S/Net	1/02/2012	1101	24020/1/0	ddddd	100	13Q		N	0	19.1	-8.29	10.81
AS/Net	20/01/2012	1101	24006/1/0	AMOXYCILLIN 250mg CP	3	0			0.2	5.6	-5.39	0.01
S/Net	20/01/2012	1101	24003/1/0	SALBUTAMOL (CFC-free) 100mcg (200dose) INH	0	8288F		N	0	18.85	-8.27	10.58
S/Net	13/01/2012	1101	24001/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	13.45	-7.71	4.38
S/Net	13/01/2012	1101	24000/1/0	TEMAZEPAM 10mg TB	23	2089Y		N	0.72	13.35	-8.42	4.21
S/Net	20/12/2011	1101	23998/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	0	-7.71	-9.07
AS/Net	12/12/2011	1101	23994/1/5	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23994/1/4	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23994/1/3	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23994/1/2	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23994/1/1	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23994/1/0	AMOXYCILLIN 3g SAC	2	1878W			5.8	16.55	-8.02	2.73
AS/Net	12/12/2011	1101	23993/1/0	AMOXYCILLIN 3g SAC	4	1878W			11.6	21.65	-8.53	1.52
S/Net	7/12/2011	1101	23991/1/0	ss	200	52R		N	0	12.9	-7.66	5.24
S/Net	7/12/2011	1101	23987/1/0	PARACETAMOL 500mg TB	100	1746X		N	1.22	13.35	-7.71	4.42
S/Net	7/12/2011	1101	23985/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	13.45	-7.71	4.38
S/Net	30/11/2011	1101	23984/1/0	AMOXYCILLIN 250mg CP	20	1884E		N	1.36	13.45	-7.71	4.38
AS/Net	16/11/2011	1101	23962/1/0	IVERMECTIN 3mg TB	4	8359Y		N	20.97	34.2	-10.04	3.19

Sample Report Type: Non-PBS Items

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	----------------	--											
2	PHR.PBSPROFIT	Post Process Profit report (PBS Non-PBS items) 13 Mar 2013 14:18											
3	PBS Approval No. HS027J Claim Period 1101												
4	----------------	--											
5	Serial	Date	Period	Script#	Description	Qty	NHS		N	Cost	Charge	Rebate	Profit
6	----------------	--											
7	AC15	8/03/2012	1101	24059/1/0	TACROLIMUS 1mg CP	240	9560E	H		0	5.6	781.22	786.82
8	NonPBS	2/03/2012	1101	24057/1/0	AMOXYCILLIN 250mg CP	20				1.33	8.35	-8.35	-1.33
9	NonPBS	24/02/2012	1101	24056/1/0	TIOTROPIUM 18mcg RYN	0				0	0	0	0
10	NonPBS	24/02/2012	1101	24055/1/0	TIOTROPIUM 18mcg RYN	0				0	0	0	0
11	A39	13/02/2012	1101	24053/1/0	zzzzz	500	13Q		N	0	34.2	0.16	34.36
12	C14	7/02/2012	1101	24046/1/1	AMOXYCILLIN-CLAVULANIC ACID 875mg-125mg TB	10	8254K		N	4.16	5.6	1.37	2.81
13	C13	6/02/2012	1101	24046/1/0	AMOXYCILLIN-CLAVULANIC ACID 875mg-125mg TB	10	8254K		N	4.16	5.6	1.37	2.81
14	A37	1/02/2012	1101	24022/1/0	ddd	500	13Q		N	0	34.2	0.16	34.36
15	36	31/01/2012	1101	24013/1/0	DITH	500	13Q		N	0	34.2	0.16	34.36
16	NonPBS	10/02/2012	1101	24052/1/0	AMOXYCILLIN 250mg CP	20				1.33	5.4	-5.4	-1.33
17	NonPBS	7/02/2012	1101	24051/1/0	AMOXYCILLIN 250mg CP	20				1.33	0.15	-0.15	-1.33
18	NonPBS	7/02/2012	1101	24050/1/0	CALCIUM FOLINATE 50mg/5mL VL	2				7.98	62.3	0	54.32
19	NonPBS	6/02/2012	1101	24049/1/0	AMOXYCILLIN-CLAVULANIC ACID 875mg-125mg TB	20				8.32	5.4	-5.4	-8.32
20	NonPBS	6/02/2012	1101	24048/1/0	CALCIUM FOLINATE 15mg/2mL INJ	6				69.3	5.4	-5.4	-69.3
21	NonPBS	6/02/2012	1101	24045/1/0	CALCIUM FOLINATE 15mg/2mL INJ	5				57.75	5.4	-5.4	-57.75
22	NonPBS	6/02/2012	1101	24044/1/0	CALCIUM FOLINATE 50mg/5mL VL	1				3.99	5.4	-5.4	-3.99
23	NonPBS	6/02/2012	1101	24043/1/0	AMOXYCILLIN 250mg CP	20				1.33	0.15	-0.15	-1.33
24	NonPBS	3/02/2012	1101	24040/1/0	PHARMHOS - SMALL	1				1.02	2.45	0	1.43
25	NonPBS	3/02/2012	1101	24039/1/0	MOUTH & T PIECE KIT MISC	1				5.5	8.7	0	3.2

11. Appendix 1 – Glossary

Commonly Use Terms and Acronyms

ASN:	Advanced Shipping Notice – electronic message from supplier to confirm items packed and in transit
ATD:	Admission Transfer Discharge
DENSO®:	Brand of Scanner used throughout Pharmacies for Procurement and Imprest management
EANCOM:	Internationally recognised standard for conduction business via EDI
EDI:	Electronic Data Interchange. Term used to describe electronic transmission of Purchase Orders orders to a supplier.
GLN	Global Location Number - 13 digit number that uniquely identifies each location in a trading partners enterprise
GR	Goods Receipt – the process of updating stock in Merlin to confirm items received from supplier
GRN	Goods Receipt number
GTIN:	The Global Trade Item Number (GTIN) is an identifier for trade items. It refers to the product barcode
Hostaccess:	Terminal Emulation package. Preferred option for use with Merlin Application. The software has been written to allow data import/export to Windows applications.
HL7:	Health Level 7 (a reference to the seventh layer of the ISO OSI Reference Model – aka application layer) is an International Communication protocol for the exchange, integration, sharing, and retrieval of electronic health information.
Linux:	Powerful and reliable operating system frequently used on servers, based on INTEL and AMD CPUs
PDE:	Portable Data Entry scanner e.g. Denso, Datalogic, Symbol
PMI:	Patient Master Index – the core or backbone of any hospital database
PO:	Purchase Order
POA:	Purchase Order Acknowledgement - electronic or printed message from the supplier to confirm PO transmission successful
POSH:	Screen building system that lies between Unidata (the Database) and Merlin (the Application)
SSCC:	The Serial Shipping Container Code (SSCC) is an eighteen digit number used to identify logistics units. The SSCC number appears as a printed barcode on the delivery box (CH2)
UNIX:	Powerful and reliable operating system frequently used on mainframe computers
Unidata:	PICK Relational/multivalued Database

12. Appendix 2 - Quick Shortcut Keys

Function Description	Action	Alternate Action
From Any Field		
Backspace	Backspace	
Exit without filling	EXC	/X
Calculator	++	
Move window	/M	
Help – detailed	F1 key	/H
Help – overview	F2 key	
Paging fields (control from option prompt)		
Page Forward	Down Arrow	F
Page Back	Up Arrow	B
Change a specific field	fldno.line	
Locate a variable	L	
Add/append	A	
List/go to the end	E	
Swap two paging lines	S	
Text Fields		
Line: Insert	<RTN>	
Line: Delete	Ctrl K	
Go to: Start of Line	Ctrl A	
Go to: End of Line	Ctrl E	
Go to: Next Word	Ctrl N	
Go to: Previous Word	Ctrl P	
Page: Forward	Ctrl V	F
Page: Backward	Ctrl B	B
In –Field Commands		
Go Back a Field	Up Arrow	^
Go to Option Line	/	
Duplicate	.	
Look-up	?	
At Option Line Only		
Delete an Item	/D	
File this Item	<RTN>	F
Reinstate Closed Record	/R	
Screen Refresh	/RF	
Print screen (1)	/PS	

Acceptable Date Formats: DD-MM-YY, DD MMM YY, DDMMYY, DDMM, DD/MM/YY, D.MM, DD.MM.YYA date entry of -999 to 999 will select the date relative to today. I.e. -1 = yesterday 0 = today +1 = tomorrow