Other Third Party Administration Tasks

Agency Type Administration tasks:

- Adding an Agency Type.
- Modifying or Removing an Agency Type.

OCNA Administration tasks:

- Using the OCNA Search Window.
- Adding OCNA Information.
- Modifying or Removing OCNA Information.

Global Settings tasks:.

- Defining Claim Processing Options.
- Adding Reject Codes.
- Modifying Global Settings.

Data Partner Administration tasks:

- Searching for a Data Partner.
- Adding a Data Partner.
- Modifying Data Partner Information.
- Copying a Data Partner or a Product Exclusions List.

Viewing Claims:

- Searching for Claims and Viewing Claim Details.

Other Third Party Administration Window Elements

Agency Type Administration window elements:

- Elements in the Agency Type Administration Window.

OCNA Administration window elements:

- Elements in the OCNA Search Window.
- Elements in the OCNA Administration Window.
- Elements in the Add OCNA Information Window.

Global Settings window elements:

- Elements in the Global Settings Window.

Data Partner Administration window elements:

- Elements in the Data Partner Search Window.
- Elements in the Data Partner Details Window.

Viewing Claims window elements:

- Elements in the Claim Search Window.
- Elements in the Claim Information Window.

Other Third Party Administration Concepts

- Other Third Party Administration Tools - Overview.
- Agency Type Administration.
- OCNA Administration.
- Global Settings Administration.
- Data Partner Administration.
- Viewing Claims.

Other Third Party Administration Tools - Overview

Other Third Party Administration Tools includes tools for setting up the following:

- Agency Types.
- OCNA (Other Carrier Name and Address) Insurance agencies.
- Global or system wide settings that once set are true for the entire T-Rex One Enterprise system.
- Data Partners.

This section also includes a description of how to **Claim Information View** in the system.

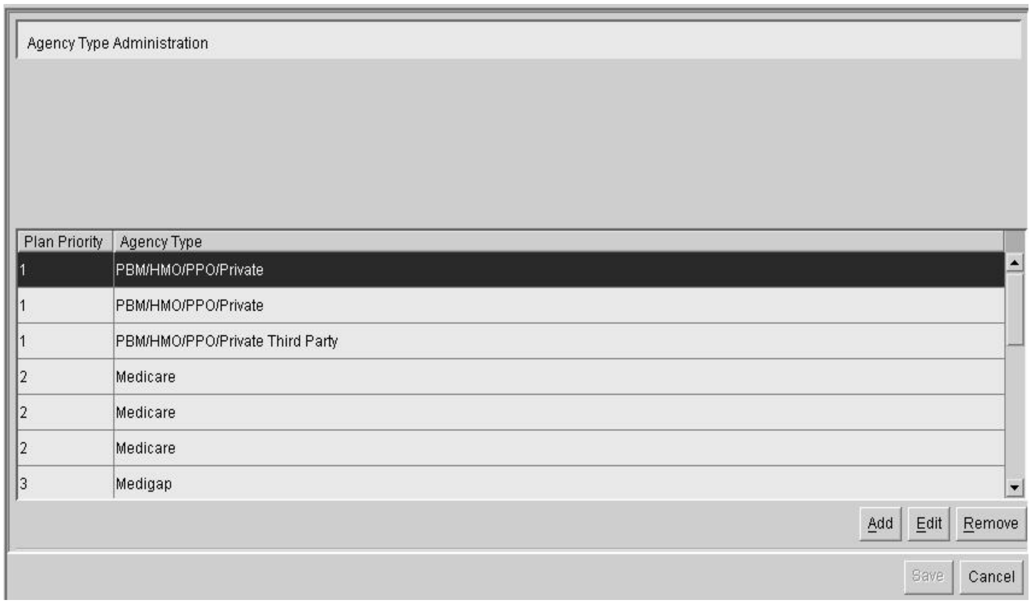
Agency Type Administration

In **Agency Type Administration** you set up agency types, and related priorities.

The system uses the priorities you assign here to rank insurance plan use for a patient.

- When setting up **General Information** for a third party plan, you can select an agency type. Then, in a patient's third party record (**Patient Profile**, **Third Party** tab), the system uses the agency type to rank a patient's insurance plans.
- This information is used in assigning COB priorities, and the default billing order of the plans. During Prescription processing the following rules apply:
  - If more than one plan has the same priority (for example, PBM, and Hospice), then the **Billing Type** (in the **Patient Profile**) is used to rank the plans. **Real Time** plans are ranked first, and **Non-Real Time** plans are ranked last.
  - If more than one plan has the same priority and the same **Billing Type**, the priority is set using the Cardholder birth date (month and day, not year).
  - If there is still a conflict or if the **birthdate** field is not completed, the pharmacy user must manually set the Third Party plan priorities.
  - Both new and refill prescriptions default to the COB billing priority defined for the patient at the time of the fill, but the pharmacy user can change the Third Party plan priorities, if appropriate.
  - If the previous fill was cash, and there has been a change to the Third Party plans in the Patient Profile, or to the priority of the plans, the system alerts the pharmacy user and displays the new order.

The Agency Type Administration Window



Elements in the Agency Type Administration Window

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Common Window Elements.

Element	Description
Agency Type Administration	Title of the window.
Agency Type table	Table listing the existing agency types. The information in the table includes the following: • **Plan Priority**. • **Agency Type** (description).
Add button	Select this to define a new agency type.
Edit button	Select this to modify the information for the agency type selected in the table.
Remove button	Select this to remove the agency type selected in the table.

Adding an Agency Type

To Add an Agency Type:

1. In the **Agency Type Administration** window, select **Add (Alt + A)**.
2. In the **Add Agency Type** window, type the following Information:
   - **Agency Description**.
   - **Set Priorit**y. Type a number for the plan priority. The following priorities are predefined in the system:

Use this Priority if...	The agency is of this type...
1	PBM, HMO, PPO, or Private Third Party.
2	Medicare.
3	Medigap.
4	MCO, BHO.
5	Medicaid, General Assistance.
6	Federally Funded, State Funded/Specialty Program.

Note: There can be gaps in the priority numbers (so, you could assign one agency type priority 7 and another priority 9, but there does not have to be an agency type with priority 8). On the other hand, you can assign more than one agency type the same priority number.

3. Select **OK**.
   The system closes the **Add Agency Type** window and adds the new agency type to the end of the **Agency Type** table in the **Agency Type** window.
4. If appropriate, repeat all previous steps to add as many agency types as necessary.
5. When you are done adding agency types, in the **Agency Type** window, select **Save**.

Modifying or Removing an Agency Type

You can change the description for an agency type, or modify its priority at any time. You can delete an agency type if it is not used by a plan whose status is **Active** (set in the **Plan Information** window).

To Modify or Remove an Existing Agency Type:

1. In the Agency Type Administration window, select the Agency Type you want to modify or remove. (Tab to the table. When the table is active, use the **Up** and **Down Arrow** keys to move the highlight to the **Agency Type** you want.)

2. Do one of the following:
   - To remove the selected **Agency Type**, select **Remove** (**Alt + R**), and confirm the deletion.
   - To modify the selected **Agency Type**, select **Edit (Alt + E)**, and in the **Edit Agency Type** window, modify the appropriate information (**Agency Description**, or **Set Priority**). Then, select **OK**.

Use this Priority if...	The agency is of this type...
1	PBM, HMO, PPO, or Private Third Party.
2	Medicare.
3	Medigap.
4	MCO, BHO.
5	Medicaid, General Assistance.
6	Federally Funded, State Funded/Specialty Program.

   Note: There can be gaps in the priority numbers (so, you could assign one agency type priority 7 and another priority 9, but there does not have to be an agency type with priority 8. On the other hand, you can assign more than one agency type the same priority number.

   If you removed an agency type, when you confirm the deletion, it is removed from the table in the **Agency Type Administration** window. If you modified an agency type, when you select **OK** in the **Edit Agency Type** window, the system displays the modified information in the **Agency Type Administration** window.

3. Select **OK**.
   The system closes the **Edit Agency Type** window and modifies the information in the **Agency Type** window.

4. If appropriate, repeat all previous steps to modify or delete as many agency types as necessary.

5. When you are done modifying agency types, in the **Agency Type** window, select **Save**.

OCNA Administration

In OCNA Administration you set up OCNA (Other Carrier Name and Address) information used to identify Medigap insurers for Medicare patients (including the OCNA number for each OCNA insurer).

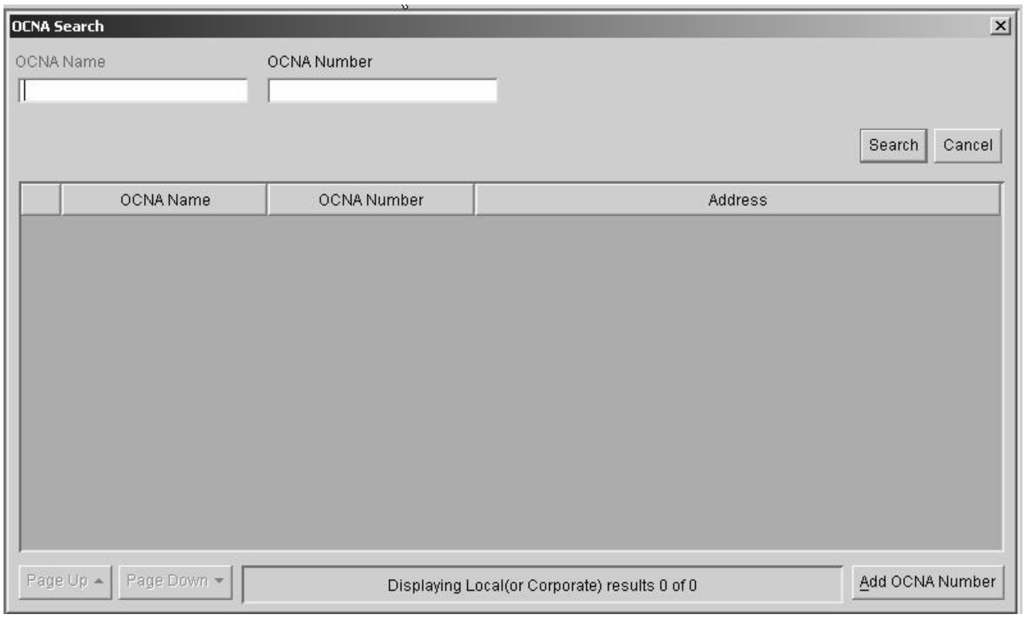
Information you set up in OCNA Administration is required during data entry when there is a Medigap plan listed in the **Patient Profile**, **Third Party** tab. To include an OCNA field in the **Additional Information** window during data entry, you must set up the field when setting up **X12837 Data** rules for a plan.

If the pharmacy user does not select an OCNA number in the **Additional Information** window during data entry, the system generates a standard Pre-Edit Exception message.

Getting Started with OCNA Administration

Whether you are adding OCNA information or editing existing information, when you select **OCNA Administration** from the **Administration** menu, the system displays the **OCNA Search** window.

The OCNA Search Window



Elements in the OCNA Search Window

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Common Window Elements.

Element	Description
OCNA Name	The name of the OCNA insurance company.
OCNA Number	The OCNA number for the insurance company.
OCNA Information table	Table listing the existing OCNA insurance companies in the system. The information in the table includes the following: • **OCNA Name.** • **OCNA Number**. • **OCNA Address.**
Add OCNA Number button	Select this to add a new OCNA insurance company to the system.

Using the OCNA Search Window

You can either:

- Search for existing OCNA information.

    a. Enter the search criteria and select **Enter**.

Note: For details go to Elements in the OCNA Search Window.

    b. If there are more items found than can appear in the list at one time, select the **Page Up** or **Page Down** until you find the item you want.

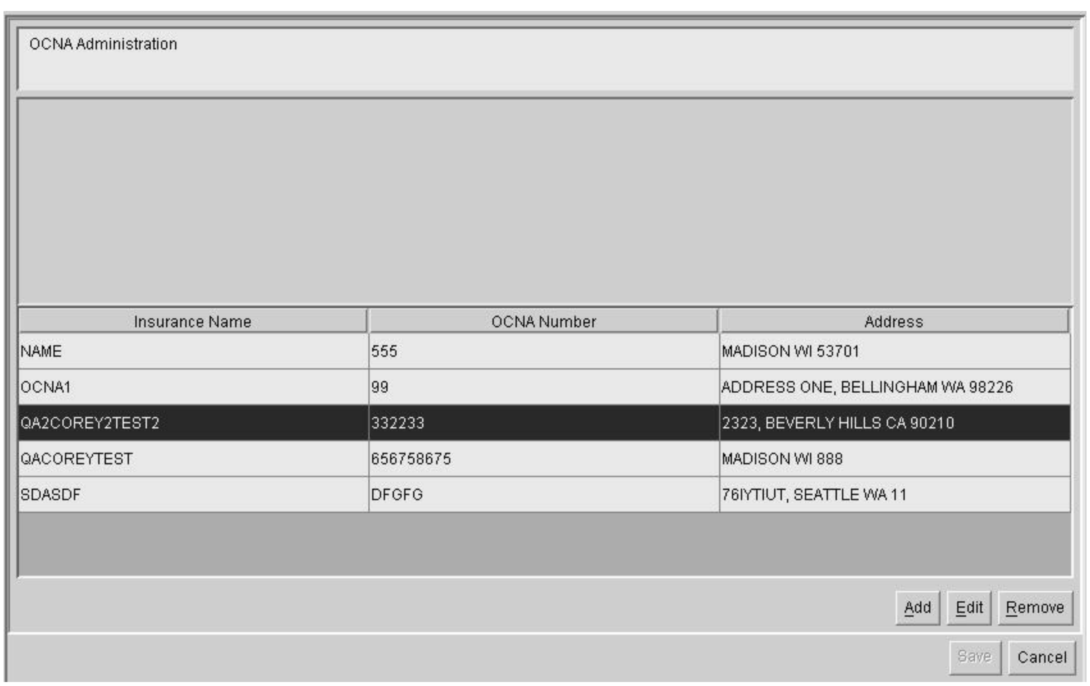
    c. If you want to work with an item found by the search, use the **Up** or **Down Arrow** keys to move the highlight to the correct row, and then press **Enter**.

The system, displays the selected OCNA information in the **OCNA Administration** window. For details go to The OCNA Administration Window.

- Add new OCNA information. Select **Add OCNA Number (Alt + A)**.

The system, displays **OCNA Administration** window. For details go to Adding OCNA Information.

The OCNA Administration Window



The OCNA Administration window lets you add new OCNA insurance companies to the system, and modify or delete OCNA information.

Elements in the OCNA Administration Window

Following is a description of the elements in the **OCNA Administration** window.

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Search Window Elements and General Elements.

Element	Description
OCNA Administration	Title of the window.
OCNA table	Table listing the OCNA information in the system, including the following: • Insurance Name • OCNA Number • Address
Add button (**Alt + A**)	Select this to add a new OCNA insurance company to the system.
Edit button (**Alt +E**)	Select this to modify the selected OCNA information.
Remove button (**Alt + R**)	Select this to Remove the selected OCNA information.

Adding OCNA Information

To Add OCNA Information:

1. In the **OCNA Administration** window, select **Add (Alt + A)**.
2. In the **Add OCNA Information** window, type at least the following required information:
   - **OCNA Name.**
   - **OCNA Number.**
   - **Address 1.**
   - **Zip Code.**
   - **City.**
   - **State/Country.**

Note: For more information, refer to Elements in the Add OCNA Information window.

3. If appropriate, type the following information:
   - **Address 2.**
   - **Phone.**
   - **Ext.**

4. Select **OK**.
   The system closes the **Add OCNA Information** window and adds the OCNA information to the end of the table in the **OCNA Administration** window.

5. If appropriate, repeat all previous steps to add information for as many OCNA numbers (and associated Medigap insurers) as necessary.

6. When you are done adding OCNA information, in the **OCNA Administration** window, select **Save**.

Elements in the Add OCNA Information Window

Note: All data fields in this table are for information associated with the Medigap insurer you are adding to the system. All fields in the window are required except Address2, phone, and ext.

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Search Window Elements and General Elements. For details on Address elements, go to Address Elements.

Element	Description
Insurance Name	Type the name of the Medigap insurer.
Insurance Number	Type the Medicare insurance number for use with Medigap.
Phone	Type the telephone number associated with the OCNA insurance company. For details go to the Telephone element in Address Elements.
Ext.	Type the extension for the telephone at the insurance company.

Modifying or Removing OCNA Information

To Modify or Remove OCNA Information:

1. In the **OCNA Search** window, type the search criteria, and select **Search** (**Enter**).

2. In the **OCNA Administration** window, select the OCNA information you want to modify or remove. (Tab to the table. When the table is active, use the **Up** and **Down Arrow** keys to move the highlight to the **Agency Type** you want.)
   Note: For details go to Elements in the OCNA Search Window.

3. Do one of the following:
   - To remove the selected OCNA information, select **Remove** (**Alt + R**), and to confirm the deletion select **Yes**.
   - To modify the selected **OCNA** information, select **Edit (Alt + E)**, and in the **Edit OCNA Information** window, modify the appropriate information. Then, select **OK**

   Note: For details go to Elements in the Add OCNA Information Window.
   If you removed OCNA information, when you confirm the deletion, the system removes it from the table in the **OCNA Administration** window. If you modified OCNA Information, when you select **OK** in the **Edit OCNA Information** window, the system updates the information in the **OCNA Administration** window.

4. If appropriate, repeat all previous steps to modify or remove information for as many OCNA numbers (and associated Medigap insurers) as necessary.

5. When you are done Modifying OCNA information, in the **OCNA Administration** window, select **Save**.

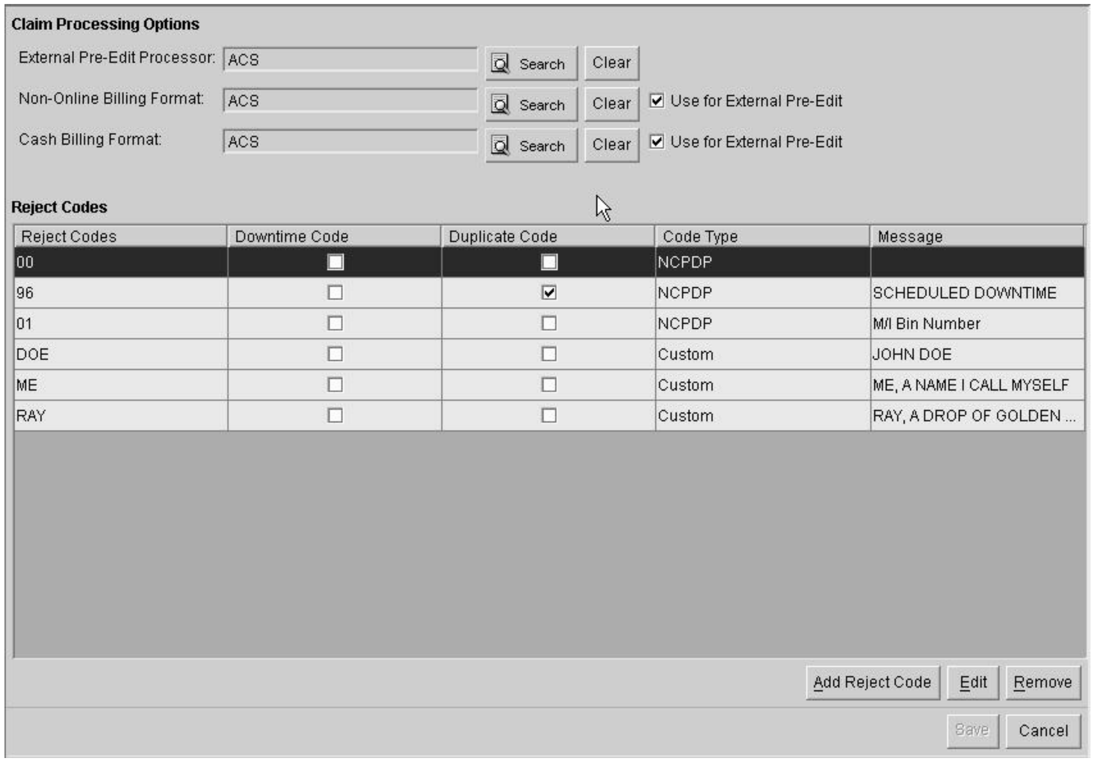
Global Settings Administration

Global Settings Administration lets you set up information that applies to the entire system, including the following:

– Claim Processing Options - Including defining the external pre-edit processor and defining cash and non-online claim formats and whether or not they are used for external pre-edit processing.

– Defining reject codes as downtime or duplicate codes as well as defining custom reject codes.

The Global Settings Window



Elements in the Global Settings Window

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Search Window Elements and General Elements.

Element	Description
Global Settings	Title of window.
Claim Processing Options	
External Pre-Edit Processor **Search** button **Clear** button	Select **Search** to search for the processor for cash and non-online claims. The processor must already be set up in **Processor Administration**. Select **Clear** to clear the **External Pre-Edit Processor** field.

Element	Description
Non-Online Billing Format **Search** button **Clear** button **Use for External Pre-Edit** Check box	Select **Search** to search for and assign a claim format for claims for non-online plans for use in the financial feed. The format must already be set up in **Claim Formats**. Select **Use for External Pre-Edit** if the claim format is to be used for external pre-edits. When selected, the system displays the **Intermediate Auth Type ID** and **Intermediate Auth ID** fields on the **Additional Information** window for the plan so that the pharmacy user can specify that authorization occurred. • If you do not select this check box, the system does not send transactions for non-online plans to the external Pre-Post Edit system. • If you do select it, the system uses the selected format to submit transactions for non-online plans to the Pre-Post Edit system, unless a billing format is set up for the plan in plan administration. In which case, the system uses the format set up for the plan. Select **Clear** to clear the **Non-Online Billing Format** field.
Cash Billing Format **Search** button **Clear** button **Use for External Pre-Edit** Check box	Select **Search** to search for and assign a claim format for cash prescriptions for use in the financial feed. The format must already be set up in **Claim Formats**. If this is not defined, cash transactions are not passed to the financial feed. Select **Use for External Pre-Edit** if the claim format is to be used for external pre-edits. • If you do not select this check box, the system does not send cash transactions to the external Pre-Post Edit system. • If you do select it, the system uses the selected format to submit cash transactions to the Pre-Post Edit system. Select **Clear** to clear the **Cash Billing Format** field.
Reject Codes	

Element	Description
Reject Code table	Table listing system-wide NCPDP and custom reject codes. The information in the table includes the following: • Reject Code. • Downtime Code. To clear or select the checkbox for a code, select Edit. • Duplicate Code. To clear or select the checkbox for a code, select Edit. • Code Type. • Message.
Add Reject Code button	Select this to add a reject code and related information to the global settings reject code table.
Edit button	Select this to modify the information for the reject code selected in the reject code table.
Remove button	Select this to remove a reject code selected in the table.

Defining Claim Processing Options

Note: Remember that the settings you define for Global Settings are for the entire system.

To Assign a Processor and Claim Formats:

1. In the **Global Settings** window locate the Pre-Edit Settings in the upper portion of the window.

2. To search for and assign a processor for cash and non-online claims, select the **Search** button for **External Pre-Edit Processor Name**.

   a. In the **Processor Search** window, type or select search criteria for the processor you want, and then select **Search** (**Enter**).
   The system lists the processors found in the search results table.
   Note: The available search criteria is **Processor Name**.

   b. Select the processor you want (Use the **Up** and **Down Arrow** keys to move the highlight to the processor name, and press (**Enter**).
   The system displays the processor name in the **External Pre-Edit Processor Name** field.

3. To search for and assign a claim format for non-online claims, select the **Search** button for **Non-Online Billing Format**.

a. In the **Claim Format Search** window, type or select search criteria for the claim format you want, and then select **Search** (**Enter**).

Note: The available search criteria are **Format Name**, **Format Description**, **Transaction Type**, **Status**. For details go to Elements in the Claim Format Search Window. You might want to specify **Billing** for the **Transaction Type** search criterion. For details go to Elements in the Claim Format Search Window.

The system lists the claim formats found in the search results table.

b. Select the claim format you want (Use the **Up** and **Down Arrow** keys to move the highlight to the claim format name, and press (**Enter**).

The system displays the claim format name in the **Non-Online Billing Format** field.

4. To search for and assign a claim format for cash transactions, select the **Search** button for **Cash Billing Format**.

a. In the **Claim Format Search** window, type or select search criteria for the claim format you want, and then select **Search** (**Enter**).

The system lists the claim formats found in the search results table.

Note: The available search criteria are **Format Name**, **Format Description**, **Transaction Type**, **Status**. You might want to specify **Billing** for the **Transaction Type** search criterion. For details go to Elements in the Claim Format Search Window.

b. Select the claim format you want (Use the **Up** and **Down Arrow** keys to move the highlight to the claim format name, and press (**Enter**).

The system displays the claim format name in the **Cash Billing Format** field.

5. To save the settings, select **Save** (**Enter**).

Note: To close the **Global Settings** window without saving the changes and return to the T-Rex One Enterprise system **Home Page**, select **Cancel**.

Adding Reject Codes

Note: Remember that the settings you define for Global Settings are for the entire system.

To Add a Reject Code:

1. In the **Global Settings** window locate the Reject Code table and associated buttons in the lower portion of the window, then select **Add Reject Code**.
   The system displays the **Select Reject Codes** window.

2. In the **Select Reject Codes** window, select either **NCPDP codes**, or **Custom codes**.

   - If you selected **NCPDP Codes.** In the **Code Name** list, select the NCPDP reject code to add to the list, and review the associated message. Then, go on to Step 3.
   - If you selected **Custom Codes**. Type the name of the custom reject code, and

in the **Message** box type a message for the custom code. Then, go on to Step 3.

3. If the code identifies a downtime condition, select **Downtime Code**.

4. If appropriate, select **Duplicate Code**.

5. Select **OK**.

6. In the **Global Settings** window, select **Save**.

Note: To close the **Global Settings** window without saving the changes and return to the T-Rex One Enterprise system **Home Page**, select **Cancel**.

Modifying Global Settings

You can modify any of the settings defined in the **Global Settings** window, but remember that any changes you make are for the entire system.

To Modify Global Settings:

1. Do one of the following:
   - To modify Claim Processing Options, go to Step 2.
   - To modify Reject Codes, go to Step 4.

   Note: For details go to Elements in the Global Settings Window.

2. To search for and assign another processor for cash and non-online claims, select the **Search** button for **External Pre-Edit Processor Name**.
   a. In the **Processor Search** window, type or select search criteria for the processor you want, and then select **Search** (**Enter**).
   The system lists the processors found in the search results table.
   Note: The available search criteria is **Processor Name**.
   b. Select the processor you want (Use the **Up** and **Down Arrow** keys to move the highlight to the processor name, and press (**Enter**).
   The system displays the processor name in the **External Pre-Edit Processor Name** field.

3. To search for and assign another claim format for cash or non-online claims, select the appropriate **Search** button (either **Cash Billing Format** or **Non-Online Billing Format**.
   a. In the **Claim Format Search** window, type or select search criteria for the claim format you want, and then select **Search** (**Enter**).
   The system lists the claim formats found in the search results table.
   Note: The available search criteria is **Format Name**, **Format Description**, **Transaction Type**, **Status**. For details go to Elements in the Claim Format Search Window.

b. Select the claim format you want (Use the **Up** and **Down Arrow** keys to move the highlight to the claim format name, and press (**Enter**).

The system displays the claim format name in either the **Cash Billing Format** or the **Non-Online Billing Format** field depending on which search button you selected.

4. To modify the reject codes, in the Reject Code table in the lower portion of the window, select the reject code you want, then select **Modify**. (Use the **Up** and **Down Arrow** keys to highlight the reject code, and then select **Enter**.)
   The system displays the information for the selected reject code in the **Select Reject Codes** window.

   a. In the **Select Reject Codes** window, modify appropriate information.

   b. Select **OK**.

5. In the **Global Settings** window, select **Save**.

Note: To close the **Global Settings** window without saving the changes and return to the T-Rex One Enterprise system **Home Page**, select **Cancel**.

Data Partner Administration

If you contract with a data partner, or external business partner, **Data Partner Administration** lets you set up the information needed for online submittal of claims to that data partner.

- For every transaction, failed and paid, third party and cash, between the Data Entry and Product Dispensing workflow steps, the system creates a transaction and submits it online to your data partner(s).
- In Data Partner Administration, by linking to established claim formats, you can define NCPDP 5.1 fields to submit to specific data partner(s).
- You can build an exclusions list for a data partner. For example, you might do this if you have exclusive distribution rights for dispensing certain product(s) and you want to hold back information on the product from a data partner.

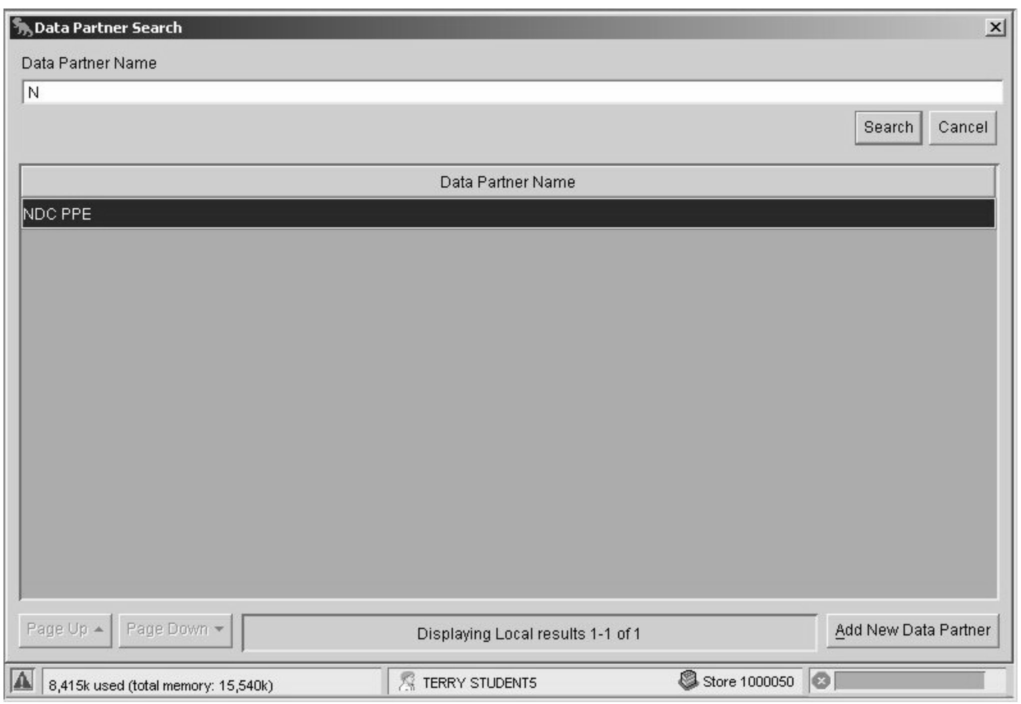
  With holding product information affects request, reversal, and edit (an edit is a cancel followed by an add transaction) transactions. An exclusion list does not withhold transaction information for a compound for which an excluded product is an ingredient.
- You can make a copy of a data partner or of an exclusions list for a data partner.

Searching for a Data Partner

When you select **Data Partner Administration** from the **Third Party Administration** menu, the system displays the **Data Partner Search** window.

- To search for all data partners in the system, select **Search** (**Enter**).
  The system displays the search results in the table in the lower portion of the window.
- To search for a specific data partner, Type the first several letters of the name or the entire name, and select **Search** (**Enter**).
  The system displays the search results in the table in the lower portion of the window.
- To add a new data partner, select **Add New Data Partner**.
  The system displays the **Data Partner Detail** window. For details go to Adding a Data Partner.

The Data Partner Search Window



Elements in the Data Partner Search Window

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Search Window Elements and General Elements.

Element	Description
Data Partner Name	(Optional) Type the name of the external data partner.
Search results table	Table of data partners on record in the system that match the search criteria.
Add New Data Partner button	Select this to add a new Data Partner to the system.

Adding a Data Partner

This section assumes the **Data Partner Search** window is opened. If it is not opened, in the **Third Party Administration** menu, select **Data Partner Administration**.

To add a Data Partner:

1. In the **Data Partner Search** window, select **Add New Data Partner**.
   The system displays the **Data Partner Details** window.
   Note: For details go to Elements in the Data Partner Details Window.

2. In the **Data Partner Name** field, type a name for the new data partner.
   Note: If you decide not to add a new data partner, but to search for an existing data partner to modify or copy, select the **Search** button to the right of the **Data Partner Name** field. For details go to Searching for a Data Partner.

3. In the **Driver Name** field, you can either:

   - Type the name of an existing destination set up in **Destination Administration**.
   - Select the **Search** button to the right of the **Driver Name** field.

     a. In the **Destination Search** window, type the **Destination Name** and select **Search** (**Enter**). Or, just select **Search** to view all destinations configured for the system.

     b. In the search results table, select the destination you want.

4. To link an existing claim format to this data partner:

   a. Select **Add Billing Format**.
   The system displays the **Add Billing Format Link** window.

b. In the **Add Billing Format Link** window **Type** field, select the type of billing format you want to link. Select one of the following: **All**, **Billing**, **Reversal**, **Eligibility**, **Response**.

c. For the **Billing Format Name** field, select the **Search** button, to the right of the field.

- In the **Claim Format Search** window, type the search criteria and select **Search** (**Enter**). Or, just select **Search** to view all available claim formats. Then, in the search results table, select the claim format you want. For details on searching for an existing claim format, go to Using the Claim Format Search Window.

The system displays the selected claim format in the **Billing Format Name** field.

d. Type or select the **Effective Date** and if appropriate, the **Termination Date** for the billing format link.

e. Select **OK**.
The system displays the information for the billing format in the **Data Partner Detail** window billing format table.

5. To create an exclusions list for the data partner:

a. select **Add Product**.
The system displays the **Add Product Link** window.

b. For the **Product Name** field, select **Search**.
Note: To search for a product, in the **Product Search** window, type the search criteria and select **Search Local** (**Enter**) or **Search Corporate (Alt + E)**. Then, in the search results table, select the product you want. For details go to Elements in the Product Search Window.
The system displays the selected product in the **Product Name** field.

c. Type or select the **Effective Date** and if appropriate, the **Termination Date** for the product link.

d. Select **OK**.
The system displays the information for the product in the **Data Partner Product Exclusion** table.

e. Repeat Step 5. to add more products to the exclusion list.

6. Select **Save**.

Elements in the Data Partner Details Window

Note: For details on window elements that are common to many windows in the system, such as Save and Cancel, go to Search Window Elements and General Elements.

Element	Description
Data Partner Name	Type a name for the new data partner.
Search	To search for an existing data partner, select **Search**.
Driver Name	In this field, the system displays the name of a driver selected from a search.
Search	To search for a driver set up in **Destination** administration select **Search**.
linked billing formats table	This is a list of billing formats linked to this data partner using **Add Billing Format**. The information available includes: • Type. • Billing Format Name. • Billing Format Description. • Link Effective Date. • Link Termination Date.
Add Billing Format button	Select this to search for and set up a link to a billing format for the **Data Partner.**
Edit button	Select this to modify the link information for the selected claim format.
Remove button	Select this to remove the selected claim format link.
Data Partner Product Exclusion List	This is a list of products for which you want to withhold information from the data partner.
Add Product button	Select this to search for and add a product to the **Data Partner Product Exclusion List.**
Edit button	Select this to modify the information for the product selected in the Data Partner Product Exclusion List.
Remove button	Select this to remove a product selected in the Data Partner Product Exclusion List.

Modifying Data Partner Information

You can make a copy of an existing data partner, and change any information for it. Once added, you can not remove it from the system, however you can inactivate it by setting the **Termination Date**. You can also make a copy of the exclusions list for a data partner, and apply it to another data partner. For details go to Copying a Data Partner or a Product Exclusions List.

To modify a data partner:

1. In the **Data Partner Search** window, type the name of the data partner and select **Search** (**Enter**), or to view all data partners, just select **Search**. Then, select the data partner of interest.
   The system displays the **Data Partner Details** window.
   Note: For details go to Elements in the Data Partner Details Window.

2. If appropriate, in the **Data Partner Name** field, type a new name for the data partner.
   Note: If you decide you want to modify another data partner, instead, you can search for another data partner. Select the **Search** button to the right of the **Data Partner Name** field.

3. If appropriate, in the **Driver Name** field, type the name of an existing destination, or search for another destination:
   - Type the name of an existing destination set up in **Destination Administration**.
   - Select the **Search** button to the right of the **Driver Name** field.
     a. In the **Destination Search** window, type the **Destination Name** and select **Search** (**Enter**). Or, just select **Search** to view all destinations configured for the system.
     b. In the search results table, select the destination you want.

4. If appropriate, edit the link information for a billing format linked to the data partner:
   a. In the linked billing formats table, select the billing format of interest (Use the **Up** and **Down Arrow** keys to move the highlight to the billing format name). Then, do one of the following:
   - To remove the link to the selected billing format, select **Remove**, then confirm the deletion. Go on to Step 5.
   - To modify the link information, select **Edit**. Go on to the following steps.

   b. If you selected **Edit** in the previous step, in the **Edit Billing Format Link** window change the appropriate link information.
   Note: You probably only want to change the **Effective** or **Termination Date**, since if you want to select a new billing format, you can do so from the **Data Partner Details** window.

   c. Type or select the **Effective Date** and if appropriate, the **Termination Date** for the billing format link, then select **OK**.
   The system displays the revised information for the billing format in the linked billing format table.

5. To modify the exclusions list for the data partner:
   a. In the **Data Partner Product Exclusions List**, select the product of interest. Then, do one of the following:
   - To remove the link to the selected product, select **Remove**, then confirm the deletion. Go on to Step 6.

- To modify the link information, select **Edit**. Go on to the following steps.

The system displays the **Edit Product Link** window.

b. If you selected **Edit** in the previous step, in the **Edit Product Link** window change the appropriate link information.

Note: You probably only want to change the **Effective** or **Termination Date**, since if you want to select a product, you can do so from the **Data Partner Details** window.

c. Type or select the **Effective Date** and if appropriate, the **Termination Date** for the product link, then select **OK**.

The system displays the revised information for the product in the **Data Partner Product Exclusions List**.

6. Select **Save**.

Copying a Data Partner or a Product Exclusions List

1. In the **Data Partner Search** window, type the name of the data partner whose information you want to copy and select **Search** (**Enter**), or to view all data partners, just select **Search**. Then, select the data partner of interest.
   The system displays the **Data Partner Details** window.

2. In the **Data Partner Details** window, select **Copy**.
   The system displays the **Copy** window.

3. In the **Copy** window, do one of the following:
   - To make a copy of the data partner:
     a. Make sure that **Data Partner** is selected in the first (unlabeled) list.
     b. Then, in the **Rename Data Partner** box, type a new data partner name for the copy.
     c. Select **OK** (**Enter**).
     d. Make any modifications for the new data partner, and then select **Save** (**Enter**).
   - To copy the product exclusions list to another data partner:
     a. In the first (unlabeled) drop down list, select **Product Exclusions List**.
     b. When the system displays the **Pick Data Partner Target** list, select the data partner to which you want to copy the product exclusion list.
     c. Select **OK** (**Enter**).

   The system appends the product exclusions list to the exclusions list of the selected data partner.

Viewing Claims

You can view claims in the system that match various search criteria using **Claim Information View** on the **Third Party Administration** menu. Once found, you can view details of a selected claim. For details go to Searching for Claims and Viewing Claim Details.

Elements in the Claim Search Window

Following is a description of the elements in the **Claim Search** window.

Note: For details on window elements that are common to many windows in the system, such as Search and Cancel, go to Search Window Elements and General Elements.

Element	Description
Store Number	(Required) This is the number of the store that submitted the claim. It is the Facility ID from Facility Maintenance.
Rx Number	(Required) This is the number of the prescription from the **Data Entry** workflow.
Refill Number	This is the refill number from the **Data Entry** workflow.
Third Party Name	This is the name of the third party plan to which the claim is submitted, as set up in Plan Administration.
Third Party Code	This is the **Third Party Code** for the third party plan to which the claim is submitted, as set up in **Plan Administration**.
Date of Service	This is the date when the claim was submitted.
search results table	This lists claims found by a search. There is a column in the table for each of the search criterion described in this table.

Searching for Claims and Viewing Claim Details

1. From the **Third Party Administration** menu, select **Claim Information View**. The system displays the **Claim Search** window.

2. Type the **Store Number**, and the **Rx Number**.

3. If appropriate, type or select other search criteria.

4. Select **Search** (**Enter**).
   The system displays summary information for the claims matching the search criteria.

5. To view the detail for a claim found by the search:

   a. In the search results table, select the claim of interest. (Use the **Up** and **Down Arrows**, and **Page Up** and **Page Down** to move the highlight to the claim, and press (**Enter**).
   The system displays the details for the selected claim in the **Claim Information View** window. For details go to Elements in the Claim Information Window.

   b. To view details for a specific segment of the claim, in the **Segment Navigation List**, select the segment you want to view.

   c. When you are done viewing details for the selected claim, select **Close**.

6. To close the **Claim Search** window and return to the T-Rex One Enterprise system **Home Page**, select **Cancel**.

Elements in the Claim Information Window

Element	Description
Response Status	This section includes the following response status information: • Header and Transaction Response Status • Transaction Code • Authorization Number • Transaction Type • Number of Times Submitted • Billing Format Name
Patient Information	This section includes the patient name and address, phone number and birth date.
Third Party Information	This section includes the following: • Third Party Plan Name • Third Party Code, • Group Number • Processor BIN and PCN • Service Provider ID • Service Date.

Element	Description
Rx Information	This section includes the following: • Dispensed Product • NDC Number • Quantity Dispensed • Days Supply • Rx Number • Tx Number • Store Number
Segment Navigation	This lists the segments in the claim format. To view information for a segment, select it from the list.
Close	Select this to close the **Claim Information** window.