2.Plan Administration - Plan Structure

Tasks in Plan Administration - Plan Structure

- Using the Third Party Plan Search Window.
- Adding a Plan and Specifying Overall Plan Information.
- Modifying Plan Information or Deleting a Plan.
- Copying a Plan.
- Linking a Network to a Plan.
- Modifying Linked Network Information or Deleting a Linked Network.
- Adding a Group.
- Modifying Group Information or Deleting a Group.
- Copying a Group.

Window Elements in Plan Administration - Plan Structure

- Elements in the Third Party Plan Search Window.
- Basic Elements in the Third Party Administration Window.
- Elements in the Plan Information Window.
- Elements in the Network Information Window.
- Elements in the Group Information Window.

Concepts in Plan Administration - Plan Structure

- Pharmacy Networks.
- Groups Within a Plan.
- Hierarchy, Rules and Inheritance.
- Copying Rules and Data Filters Between Levels and Groups.
- Publishing a Plan and Plan Information.
- Partial Setup, Modifying, or Removing a Plan or its Parts.
- The Plan Information Window.
- The Network Information Window.
- The Group Information Window.
- Diagram of Basic Plan Hierarchy.

Plan Administration - Plan Structure - Overview

A third party plan is an individual or group health plan or other third party payer that pays the cost of transactions that pharmacies submit to them on behalf of patients.

This chapter describes how to design and build a structure for a third party plan using the **Third Party Administration**, **Plan Administration** command. Building a structure for a plan is part of **Plan Administration**, but it is not the only task performed during plan administration.

During Plan Administration you also define a third party insurance plan’s rules including the following:

- General Information.
- Rules regarding plan setup.
- Coverage limits.
- Billing.
- Accepted claim formats.
- Data handling.
- Formulary.
- Current processor.

The **Third Party** window's two panes with the current plan's tree structure in the left pane and an information window in the right pane allows you to view the plan's structure while setting up a plan's rules. For details go to The Third Party Administration Window.

The tree structure for a plan graphically shows the plan's structure. It contains a node (branch) for each type of rule you need to define for a plan. During plan setup you add rule sets for each rule type and define the rules. For details go to Using Tree Structures.

You can also add and define data filters for all rule sets but **General Information**. For details go to Working with Data Filters.

When you define the rules, the rules and any information defined for a selected rule set are in the information window in the right pane.

In order to set up a plan efficiently, you need to plan and design the hierarchy for the plan (its structure) as well as define its rules. This is because there can be more than one hierarchical level to a plan, and because the definition of a rule is inherited from one level to another, but can be overridden at a lower level. For details go to Hierarchy, Rules and Inheritance.

Plan Structure - Additional Information

While you can and most likely will work simultaneously on setting up a plan's structure and setting up its rules, for explanation sake, it is easiest to separate these tasks. This chapter concentrates on designing and building the structure. Other chapters describe related information.

You may want to refer to the following information before beginning to design and set up a plan's structure:

For information on...	Refer to this Third Party Administration section...
Third Party Administration in general.	Third Party Administration
Adding and setting up plan rules and data filters.	Plan Administration - Setting Up - Overview
The interrelationship between setting up pharmacy networks and linking networks to a plan.	Network Administration Overview

Pharmacy Networks

In general a plan can have two or three levels:

- The overall plan level.
- A level for associated pharmacy networks.
- A level for groups that belong to the plan or to any linked network.

Pharmacy networks are set up in **Network Administration** and linked to plans during **Plan Administration**.

Groups are set up for plans and linked networks during **Plan Administration**.

Networks are groups of pharmacies that share certain characteristics, and can be linked to third party plans. A network can be linked to more than one plan.

- Since third party plans can have different pricing and coverage rules depending upon the classification of a store, during plan setup, you can define various characteristics such as store eligibility, plan parameters, and pricing rules for a linked network.
- In order for a store to be eligible for a plan, during **Plan Administration** one or the other of the following two conditions must exist.
  - Either it must belong to a network linked to a plan.
  - In the **Plan Information** window, the **All Stores Eligible** option must be selected.
- The ability to link networks to plans means that you do not need to add an entirely new plan for a few stores with minor exceptions. You can easily vary the eligibility and pricing rules depending on the network.

When you link a network, all of the basic information defined for the network, including all stores in the network, is available to the plan. For details go to Network Administration Overview.

Groups Within a Plan

If applicable you can define one or several groups that belong to the plan. Groups are employers, credit unions, or trade associations which provide coverage for individuals and sometimes their dependents.

A group can be added at the plan or network level and can have rules that differ from rules for the plan or the linked network to which it is associated.

- Group rules supersede both plan and network rules.
- You might want to define a group if its rules differ from a plan's general rules or a linked network's rules. For example, a store may be eligible for a plan but not eligible for a specific group within the plan. In such a case, you could exclude the

group from a network of stores. You could define multiple groups, with pricing, drug, and plan edit exceptions based on State Codes for Medicare Assigned or Unassigned patients.

Plan Groups are specified by name and number in the **Patient Profile**, **Third Party** tab.

You can exclude an entire group from the plan or the linked network. If an entire group is defined as excluded you do not need to set up any other rules for the group.

You can modify any information for a group or delete a group anytime before it is published. After you publish it, you cannot modify the **Group Number** or the Effective Date nor can you remove a group from a plan. After you publish a group you cannot remove any node above it in the tree structure.

Hierarchy, Rules and Inheritance

Rules are inherited from the plan level to the linked network level to any groups that belong to a linked network and from the plan level to groups that belong to the overall plan. The following rules govern rules for the overall plan, its linked networks and any groups at the plan or network level.

- A network's rules are inherited from the plan to which it is linked, but if the definition of a rule at the network level differs from that at the plan level, the network rule takes precedence.
- If a rule for a group added at the plan level differs from the rule for the overall plan, the group rule takes precedence.
- If a rule for a group added to a network differs from the rule for that network, the group rule takes precedence.

Copying Rules and Data Filters Between Levels and Groups

To facilitate the creation of the plan structure, you can make copies of entire plan or of parts of the plan structure.

- You can make a copy of an entire plan, including its linked networks, groups, and all rules set up for it.
- You can copy a group to any network linked to a plan.
- You can copy a group that is part of a network to the plan level.
- You can copy any set of rules except those for coverage limits and linked processors,
  - From the plan level to a network, or group.

   - From a network or group to the plan level.
- You can copy sets of rules between networks and groups, or from a network to a group, or a group to a network.
- You can copy data filters for a specific set of rules:
   - To the same set of rules in a different network or group.
   - From a network or group to the plan level.
- In general, you cannot copy sets of rules, data filters, groups or linked networks to a completely different plan. You can, however, copy formulary rules between plans.
- During Network Administration and Processor Administration, you can make copies of networks and processors. For details go to Network Administration Overview and Processor Administration Overview.

Note: If you define the rules sets for a plan, group or network, as well as data filters for appropriate sets of rules before copying, you only need to change the rules or data filter definitions that differ.

For details go to Copying a Plan**,** Adding and Maintaining Groups**,** Copying a Group**,** Plan Administration - Setting Up - Overview.

Publishing a Plan and Plan Information

There are two general statuses for third party plans, linked networks, and groups belonging to a plan or to a linked network. This includes any rule set, processor, claim format, or data filter defined for the plan, network, or group. These statuses are:

- **Pending**. When you add a plan, network, group, rule set, etc., it is in a **Pending**, or draft state. While in a pending state, you can delete it, or modify any information defined for it. You can use it for test purposes, but you can not use it for live adjudication and claims submittal. You can set up a structure for a plan and define various rules sets and test the setup before publishing.
- **Published**. When you publish a plan, network, group, rule set, etc., the **Pending** indicator is removed and the plan's **Effective Date** and **Termination Date** are added. After publication, you can not delete the plan, network, or group. This is also true for any published rule set, processor, claim format, or data filter defined for a plan, network, or group.
   - You cannot publish a plan unless a Claim Format is linked to it.
   - You can publish an entire plan along with all subordinate nodes in the plan's tree structure (all linked networks, groups, rule sets, processors, claim formats, and data filters), an entire linked network and all subordinate nodes, or an entire group and all subordinate nodes.
   - You can publish just a selected node without publishing subordinate nodes. This means you can publish individual rule sets, processors, claim formats, or data filters.
   - Once you publish a plan, linked network, or a group belonging to a plan or

linked network, you cannot edit its identifying information (**Third Party Code**, **Network Number**, or **Group Number**), or its **Effective Dates**. However, you can edit any other information or inactivate it (by setting its **Termination Date**).

– After a plan or linked network is published, you can add more groups to it, or link more networks to the plan, or add more rule sets or data filters. Any items added after the plan, or linked network is published are in pending state, and need to be published before use in live adjudication and claims submittal.

Partial Setup, Modifying, or Removing a Plan or its Parts

You do not have to build a plan's structure and set up the rules for a plan in one work session. You can build part of a plan or set up some of the rules. As long as you save what you have done, but do not publish it, you can come back to do more, change or complete the setup during future work sessions.

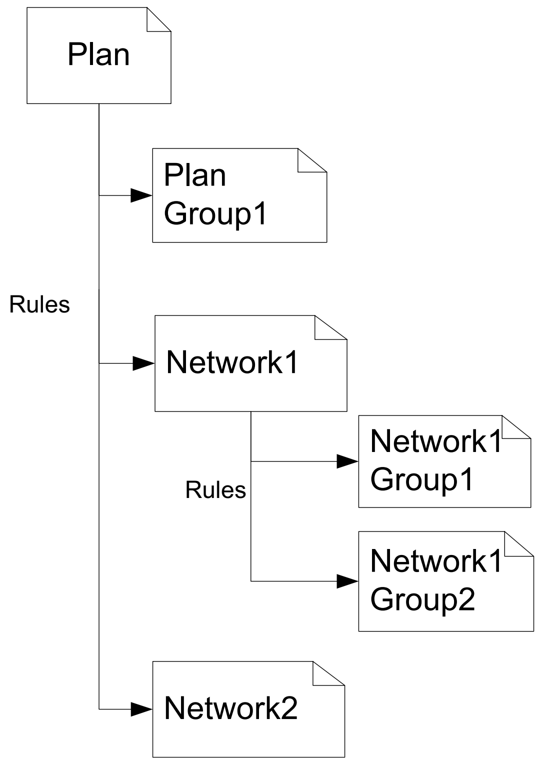
- You can make changes to a plan's structure, and add or make changes to groups, networks, or sets of rules or data filters.
- When you have completed the setup you can publish the plan, or any of its parts.
- Any time before it is published, you can remove the plan, any of its networks or groups, any set of rules, or any data filters for a set or rules. Once any part of a plan is published, you can no longer delete the plan or the published part.

In general,

- If a plan has not been published (it has a **Pending** status), you can modify any unpublished aspect of its structure or information.
- If the plan and all of the nodes in the plan tree (including all rule sets, data filters, linked networks, and groups belonging to the plan or to a linked network) have not been published, you can remove the plan from the system.
  Note: For details on removing linked networks or groups belonging to a plan go to Linking a Network and Adding or Modifying Network Information and to Adding and Maintaining Groups.
  Note: For details on removing rule sets from a plan go to Modifying a Rule Set.
- If the plan or any node in the plan tree structure has been published, you cannot remove it, but you can modify any information other than **Effective Date** and **Third Party Code**.
- You can deactivate a plan that you cannot remove by setting or changing its **Termination Date**.

Diagram of Basic Plan Hierarchy

The following diagram shows what a third party plan structure might look like. It includes a couple of linked networks, and groups at the plan and network level.



Getting Started or Picking up Where you Left Off

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

Elements in the Third Party Plan Search Window

Following is a description of the elements of the **Third Party Plan Search** window.

Note: You must type or select at least one search criteria other than Filter By (Status).

Element	Description
Third Party Plan Name (Tab to the field)	Type all or part of the name of the third party plan. This is defined as part of the **Plan Information** when you first add a plan. The system searches for matching names that begin with the letters you type.
Third Party Plan Code (Tab to the field)	Type the Third Party Plan Code for the plan you want. This is defined as part of the **Plan Information** when you first added the plan. The system searches for matching codes that begin with the letters and or numbers you type.
Pharmacy Plan Number (Tab to the field)	Type a pharmacy plan number associated with the third party plan. This is the user-defined number that can be used by a pharmacy to identify a plan and is defined as part of the **General Information** rule set. The system searches for matching numbers that begin with the numbers you type.
Processor Name (Tab to the field)	Type the name of a processor linked to the plan. The system searches for matching names that begin with the letters you type.

Element	Description
Network Name (Tab to the field)	Type the name of a network linked to the plan. The system searches for matching names that begin with the letters you type.
Group Number (Tab to the field)	Type the number of a Group that belongs to the plan. This is the ID assigned to the card-holder group or employer group. The system searches for matching names that begin with the letters you type.
FilterBy (Tab to the field, use the arrow keys to select a status, then press Enter)	Select the status of the plan. **Active**, **Inactive**, or **All**.
Search button (**Enter**)	Select this button to search your store records and the records of the other stores in your neighborhood for the product.
Cancel button (**Esc**)	Select this button to close the **Third Party Plan Search** window.
Product results table	Displays the list of plans that match the information you enter in the search fields. Click a column heading to sort by that column.
Page Up button (**Page Up** key)	Select Page Up, as needed, to view the previous page of plans that match the information you enter in the search fields.
Page Down button (**Page Down** key)	Select **Page Down**, as needed, to view the next page of plans that match the information you enter in the search fields.
Displaying... results message	Displays information about the number of plans found.

Element	Description
Add New Plan button	Select this button to add a new plan. For details go to Adding a Plan and Adding or Modifying Plan Information.

Using the Third Party Plan Search Window

Do one of the following:

- If you are adding a new plan, select **Add New Plan** and go on to Adding a Plan and Adding or Modifying Plan Information.
- If you are maintaining or continuing to build an existing plan:

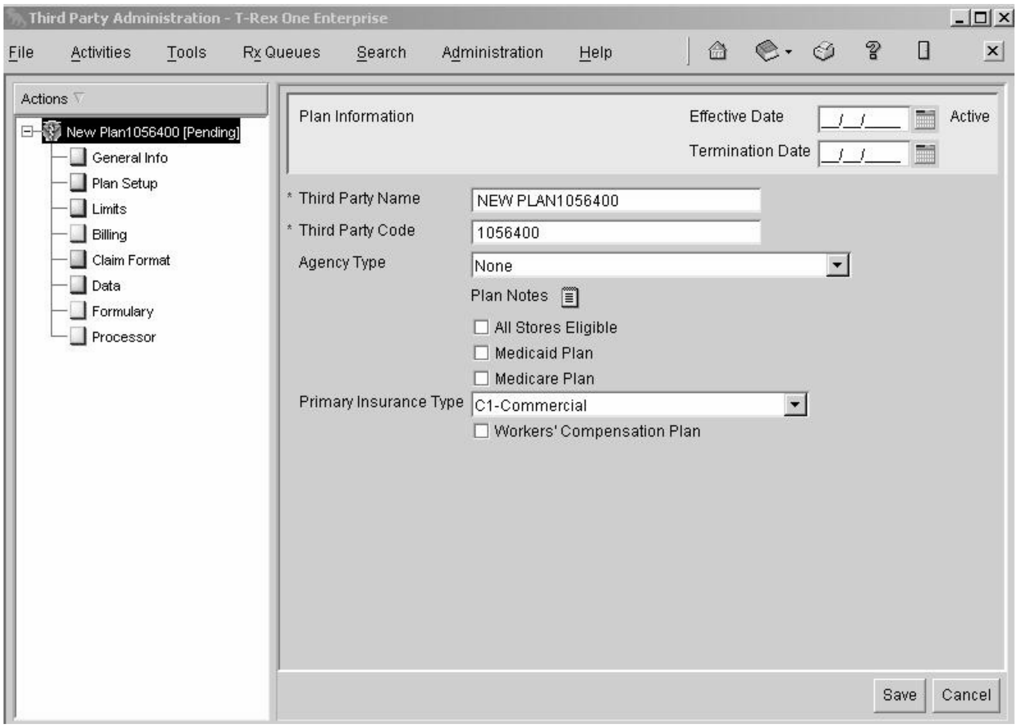
  a. Type or select the search criteria and select **Enter**.
  Note: Type at least one search criteria other than **FilterBy**. If you are interested in working with a particular part of a plan, such as a specific group, you can search by that criteria.

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

  c. If you want to work with a plan found by the search, select the row for the plan (**Alt + Row Number**), and then press **Enter**.
  Note: If you know you want to work with a specific part of a plan, such as a specific group number, select the row that includes that information.

  The system, displays the associated plan in the **Third Party** window. If you selected a specific part of the plan, such as a specific group, that part is opened. For details go to The Third Party Administration Window.

The Third Party Administration Window



The basic layout of the **Third Party** window, is always the same.

- There is always a left pane containing the **Actions** menu, and the plan's tree structure. For details go to Using Tree Structures.
- There is always a right pane. This contains either the **Plan Information** window or a **Group Information** or **Network Information** window, depending upon the node selected from the **Plan Administration Search** window.

  The actual fields and other elements in the information window in the right pane differ depending upon whether the information is for the overall plan, a linked network, or a group.
- The information in the right pane changes as you select various nodes in the plan's tree structure. When a rule node is selected, for example, Limits, it changes to show summary information for that node.
- If a rule set has been added to a node, when the rule set is selected, the information in the right pane changes to show the rules and, if defined, their definitions.

Basic Elements in the Third Party Administration Win-

dow

The Third Party window will always have these elements.

Element	Description
Actions Menu (Tab to the Actions menu, and press the Spacebar.)	This menu is in the upper left part of the **Third Party** window. The commands in the **Actions** menu let you manage plan administration. The commands are: • Search • Add • Copy • Remove • Link • Publish • Refresh Plan For details go to Using the Actions Menu to Build a Structure.
Tree structure for the current plan (Tab to the tree structure.)	This is in the left pane of the **Third Party** window, under the **Actions** menu. Its vertical tree formation with nodes lets you view the various rules for the third party plan and the networks and groups that are either linked to or are part of the plan. To open a node and view its parts, click a Plus Sign (**+**). For details go to Using Tree Structures.
Information window title	This lets you know the part of the third party plan that is opened and selected in the plan navigation tree. If you searched for and selected a plan, a network linked to a plan, or a group in a plan, it will be either **Plan Information**, **Network Information**, or **Group Information**. As you navigate through the tree, the window title reflects the part of the tree structure that is opened.

Element	Description
Effective Date (Tab to the field.)	(Required) This is the date the plan becomes effective. If you are adding a new plan, to set the **Effective Date**, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Active or **Inactive** indicator	This is either **Active** or **Inactive**. • If the **Effective Date** is in the future, the status is **Inactive**. • If it is current or in the past, and the **Termination Date** is either not set, current, or in the future, the status is **Active**. • If the **Termination Date** is in the past, the status is **Inactive**. For details go to Setting Effective Dates, Termination Dates, and Status.
Termination Date (Tab to the field.)	(Optional) This is the date the plan becomes inactive. It must be after the effective date. To set the date, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Cancel button (**Esc**)	Select this button to close the current **Third Party** window and return to the **Home Page**.
Save button (**Enter**)	Select this button to save any changes.

Using the Actions Menu to Build a Structure

The **Actions** menu is in the upper left part of the **Third Party** window. The commands in the menu let you build and manage the structure of a third party plan and setup rules for the plan. The following commands are in the **Actions** menu:

- **Search**
- **Add**

- **Copy**
- **Remove**
- **Link**
- **Publish**
- **Refresh Plan**

The commands that are available depend upon the part of the plan that is selected in the plan's tree structure.

When building the plan structure you might use the following commands:

- **Search**. Lets you search for an existing plan.
- **Add**. This command has a submenu. In the Add submenu, Plan and Group are the commands used when building a plan's structure.
  - Add, Plan. Lets you add a new plan.
  - Add, Group. Lets you add a new group to a plan, or to a selected network.
- **Copy**. Lets you make a copy of an entire plan, or copy a selected group, rule set, or data filter to an appropriate node within the current plan.
  Note: You can copy **Formulary** rules to nodes in the current plan as well as to other plans.
- **Remove**. Lets you remove an unpublished plan or an unpublished network, group, rule set, or data filter from the current plan. If an unpublished node has published nodes beneath it, you can not remove it.
- **Link**. This command has a submenu. In the Link submenu, Network is the command used when building a plan's structure.
  - **Link, Network**. Lets you link an existing network to the current plan.
- **Publish**. Lets you publish the current plan, or a selected entity within the plan.
- **Refresh Plan**. Redraws the tree structure, to reflect any saved changes to it.

Adding a Plan and Adding or Modifying Plan Information

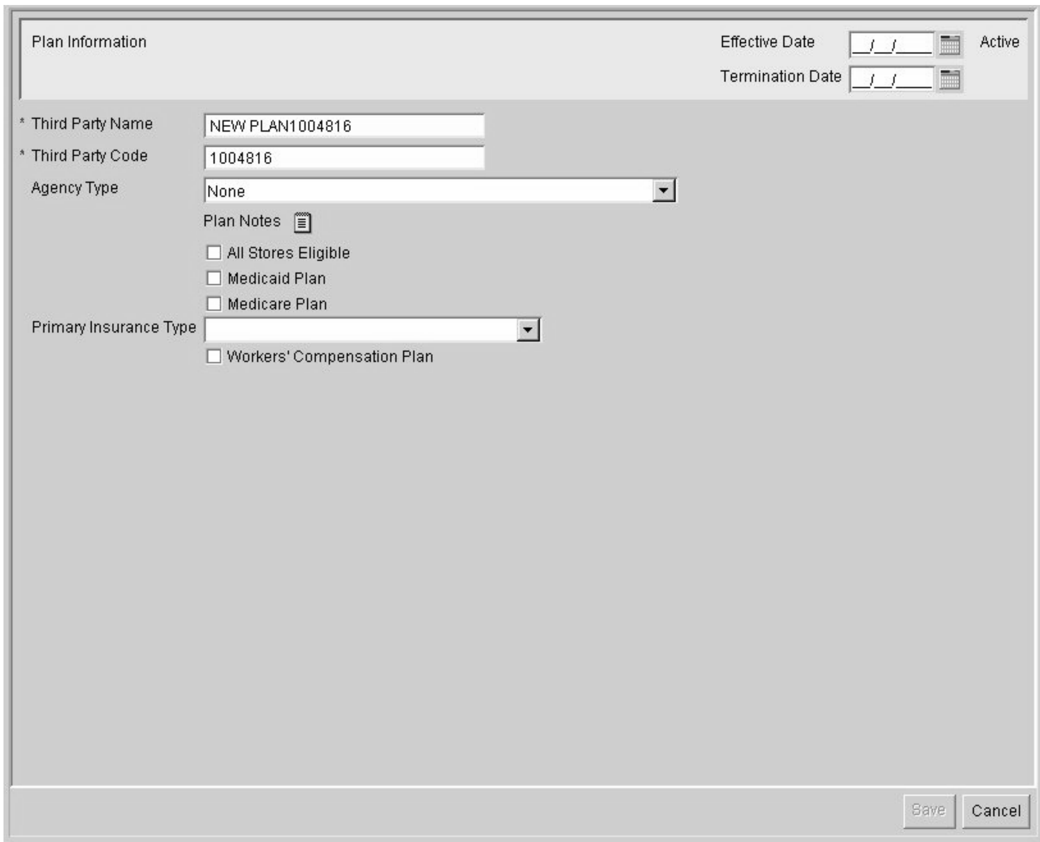
The topics in this section cover the procedures for the following:

- Adding a Plan and Specifying Overall Plan Information.
- Modifying Plan Information or Deleting a Plan.
- Setting **Effective**, **Termination** dates, and status (**Active** or **Inactive**) for the overall plan. For details go to Adding a Plan and Specifying Overall Plan Information.
- Copying a Plan.

The Plan Information Window

When you select either the **Add New** button or an existing plan in the **Third Party Plan Search** window, the system displays the two pane **Third Party** window. The **Plan Information** window is in the right pane of the **Third Party** window.

The **Plan Information** window lets you define general plan information, including identifying information (**Third Party Code** and **Third Party Name**), **Effective** and **Termination** dates and by association, the status of the overall plan. It also lets you modify any of this information.



Elements in the Plan Information Window

Element	Description
Plan Information (title)	This lets you know you are defining, viewing or modifying information for the overall plan. The information will apply to all groups and linked net-works for the plan.
Effective Date (Tab to the field)	(Required) This is the date the plan becomes effective. If you are adding a new plan, to set the effective date, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Active or **Inactive** indicator	This is either **Active** or **Inactive**. • If the effective date is in the future, the status is **Inactive**. • If it is current or in the past, and the termination date is either not set, current, or in the future, the status is **Active**. • If the **Termination Date** is in the past, the status is **Inactive**. • If the Patient Profile has only an Inactive Plan specified in the Patient Profile Third Party tab, The system displays a Pre-Edit Exception message after Data Entry. For details go to Setting Effective Dates, Termination Dates, and Sta-tus.
Termination Date (Tab to the field)	(Optional) This is the date the plan becomes inactive. It must be the same as or after the effective date. To set the date, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.

Element	Description
Third Party Name	(Required) This is the name of the third party plan. • This name is used when you add third party information in the **Patient Profile**, **Third Party** tab, the **Prescriber Profile**, **Third Party** tab, and the **Product Profile**, **Third Party** tree item. • If appropriate, you can set up Pre-Edit messages related to the third party name in the **Data** rule set for the plan, any linked network(s) or Group(s) belonging to the plan.
Third Party Code	(Required) This is the code of the third party plan. • This code is used when you add third party information in the **Patient Profile**, **Third Party** tab, the **Prescriber Profile**, **Third Party** tab, and the **Product Profile**, **Third Party** node.
Agency Type	(Optional) Select an Agency type from the list. This is the Agency Type associated with the third party plan. • Agency types are added to the system during **Agency Type** administration. • The agency type governs the order in which third party plans are assigned in the **Patient Profile**, **Third Party** tab. • For information on setting up agency types, go to Other Third Party Administration Tools - Overview.

Element	Description
Plan Notes	(Optional) Lets you add, edit or remove informational note(s) related to the third party plan. You can add a note that appears during **Plan Administration** for this plan. You can add separate notes that appear during each of the following system workflow steps. • Reception • Data Entry • Dispensing • Verification • Release to Patient
All Stores Eligible	(Optional) Select this to specify that all stores are eligible for the plan. In order for a store to be eligible for a plan, either **All Stores Eligible** must be selected, or the store must belong to a network linked to a plan.
Medicaid Plan	(Optional) Select this to specify that the plan is a third party Medicaid plan. In release 1.6 you need to select this in order to select a **State Code** for **Medicaid Edits**.
Medicare Plan	(Optional) Select this to specify that the plan is a third party Medicare discount plan. **Note:** This controls the display of the **Remaining Medicare Amount** field on the **Patient Profile Third Party** tab. If you select this for a plan, the system displays the field when the plan is selected in **Data Entry** or the **Patient Profile, Third Party** tab.
Primary Insurance Type	(Optional) If Medicare is the secondary payment type, select the code that identifies the other type of insurance to use. This is sent in the transaction feed in nightly data processing. It is a X12 837 required field.

Element	Description
Workers' Compensation Plan	Select this if, when the plan is used, information associated with a worker's compensation claim needs to be specified in the **Additional Information** window during pre-scription processing.
Cancel button (**Esc**)	Select this button to close the cur-rent **Third Party** window, and return to the T-Rex One Enterprise system **Home Page**.
Save button (**Enter**)	Select this button to save any changes.

Adding a Plan and Specifying Overall Plan Information

1. When the current window is the **Third Party Plan Search** window, select **Add New Plan** (**Alt + A**).

   The system displays the **Third Party** window.

2. In the **Plan Information** window in the right pane, specify at least the following required information:
   - **Effective Date.**

   Note: For details go to Setting Effective Dates, Termination Dates, and Status.
   - **Third Party Name.**
   - **Third Party Code.**

3. If appropriate, specify the following optional information.
   - **Termination Date.**
   - **Agency Type.**
   - **Plan Notes.**
   - **All Stores Eligible.**
   - **Medicaid Plan.**
   - **Medicare Plan.**
   - **Primary Insurance Type.**
   - **Workers' Compensation Plan.**

4. Select **Save** (**Enter**).
   Note: To close the **Third Party** window without saving, select **Cancel** (**Esc**).

Modifying Plan Information or Deleting a Plan

This section describes how to modify **Plan Information** and remove a plan from the system. It also describes how to deactivate and reactivate a plan. Your ability to modify or remove information depends on its status (whether it has been published or is in a pending state. For details go to Partial Setup, Modifying, or Removing a Plan or its Parts.

Note: The following steps assume that the plan and all of its nodes are unpublished, and that the Third Party window is the current window.

To modify Plan Information or Remove a Plan:

1. Search for and select the plan you want to delete, or whose information you want to modify:

   a. In the **Third Party Administration** menu (**Alt + A**), select **Plan Administration** (**Alt + P**).
   The system displays the **Third Party Plan Search** window.

   b. Type or select search criteria for the plan you want and select **Search** (**Enter**).
   The system displays a list of existing plans matching the search criteria.

   c. Move the highlight to the plan name you want (**Alt + Row Number**) and press **Enter**.
   The system displays the **Third Party** window with the Plan's tree structure in the left pane and the **Plan Information** window in the right pane.
   Note: If you select the plan level of the plan you want (select a row for the plan that does not list a **Processor**, **Network** or **Group Name)**, the plan opens to the **Plan Information**, and not to a **Processor Summary**, or **Network**, or **Group Information**.

2. Do one of the following:

   - **To remove the plan:**

     a. In the left pane, select the plan name (the root level of the plan structure).

     b. Select **Actions** (when the **Actions** menu is active, press **Spacebar**).

     c. In the **Actions** menu, select **Remove** (use the arrow keys to highlight **Remove** and press **Enter**).
     A message alerts you that removing the plan also removes all data attached to it, and prompts for verification that you want to do this.

     d. Select **OK** (**Enter**) to remove the plan.
     The plan is removed. The system closes the **Third Party** window and displays the **Third Party Plan Search** window.

     Note: If you decide not to remove the plan, select **Cancel** (**Esc**).
     Note: If there is any published data attached to the plan, you will not be able to remove it.

   - **To modify the Plan Information:**

     a. Type or select any of the following information.

- (If the plan’s status is Pending, this is required) **Effective Date.**
- **Third Party Name.**
- (If the plan’s status is Pending) **Third Party Code.**

Note: If the plan has been published, you will not be able to change the **Effective Date** or **Third Party Code**.

- **Termination Date.**
- **Agency Type.**
- **Plan Notes.**
- **All Stores Eligible.**
- **Medicaid Plan.**
- **Medicare Plan.**
- **Primary Insurance Type.**
- **Workers' Compensation Plan.**

b. To save the changes, select **Save** (**Enter**).

Note: If you decide not to save the changes, select **Cancel** (**Esc**).

Copying a Plan

You can make a copy of an entire plan, whether it is published or pending. Before doing so you might want to set up at least the plan rules that are the same or close to the original plan setup. Once you have a copy of the original plan, you can make changes to the copy. You can add or change rules, and delete any of part of the copied data, such as a linked network, a group, or a rule set.

Note: When you make a copy of a plan, the copy becomes the current plan.

This topic covers making changes to the overall plan information. However, you also need to reset all **Effective Dates** within the plan and any necessary **Termination Dates**, and make changes to the following parts of the plan:

- Any rules or data filters that differ from those in the original plan. For details go to Adding a Data Filter for a Rule Set, and Modifying a Rule Set.
- Any structural changes, adding or deleting linked networks and groups in the plan. For details go to Linking a Network to a Plan, Modifying Linked Network Information or Deleting a Linked Network, Adding a Group, Modifying Group Information or Deleting a Group.

To make a copy of a plan:

1. Save any unsaved changes to the current plan. Select **Save** (**Enter**).
2. In the **Actions** menu, select **Copy** (Tab to the **Actions** menu, press the Spacebar to open the menu. Then, use the Down Arrow Key to highlight Copy, and press **Enter**.)

Note: If there are unsaved changes to the current plan, a message prompts you to save the changes. To save the changes, select Yes (Enter).
The original plan is replaced by the newly created copy. All **Effective Dates** and any **Termination Dates** for the plan are blanked out. The **Third Party Plan Name** of the copy is set to Copy of <Name of Original Plan>. The system displays the **Plan Information** window.

3. In the **Third Party Plan Name** field, type a new name.
4. Set an **Effective Date** for the plan.
   Note: For details go to Setting Effective Dates, Termination Dates, and Status.
5. Reset the following required information:
   - **Third Party Name.**
   - **Third Party Code.**
6. If appropriate, reset the following optional information.
   - **Termination Date.**
   - **Agency Type.**
   - **Plan Notes.**
   - **All Stores Eligible.**
   - **Medicaid Plan.**
   - **Medicare Plan.**
   - **Primary Insurance Type.**
   - **Workers' Compensation Plan.**
7. Select **Save** (**Enter**).

Linking a Network and Adding or Modifying Network Information

The topics in this section cover the procedures for the following:

- Searching for an existing network, and Linking the network to a plan. For details go to Linking a Network to a Plan.
- Modifying or Deleting a Network. For details go to Modifying Linked Network Information or Deleting a Linked Network.
- Setting **Effective**, **Termination** dates, and status (**Active** or **Inactive**) for a linked network. For details go to Setting Effective Dates, Termination Dates, and Status.

Note: For details on adding a group to a linked network, go to Adding a Group.

Note: You can only make a copy of a network using the Network Administration command.

Linking a Network to a Plan

This procedure assumes the current window is the **Third Party** window.

To link an existing network to a plan:

1. In the **Actions** menu, select **Link**, **Network**. (Tab to the **Actions** menu, press the Spacebar to open the menu. Then, use the Down Arrow key to highlight Link. In the **Link** submenu, use the Down Arrow key to highlight Network, and press **Enter**.)
   The system displays the **Network Search** window.

2. In the **Network Search** window, type or select the search criteria.
   Note: Enter at least one search criteria other than **FilterBy**.
   The system lists all the existing pharmacy networks that match the search criteria.
   Note: For details go to Elements in the Network Search Window. All the elements are the same as those described, except, you cannot add a new network from **Plan Administration**. Use the **Network Administration** command to add a new network.
   Note: If there are more items found than can appear in the list at one time, select the **Page Up** or **Page Down** button until you find the item you want.

3. To link a network found by the search, select the row for the network (**Alt + Row Number**), and press **Enter**.

   The system, adds the linked network to the current plan's tree structure. The newly linked network is the current node and the **Network Information** window is in the right pane of the **Third Party** window. For details go to The Network Information Window.

The only information you can set in the **Network Information** window is the **Link Effective Date** and the **Link Termination Date** and by association, the **Status**.

4. Set the **Link Effective Date** for the linked network. For details go to Setting Effective Dates, Termination Dates, and Status.

5. If appropriate, set the **Link Termination Date** for the linked network. For details go to Setting Effective Dates, Termination Dates, and Status.

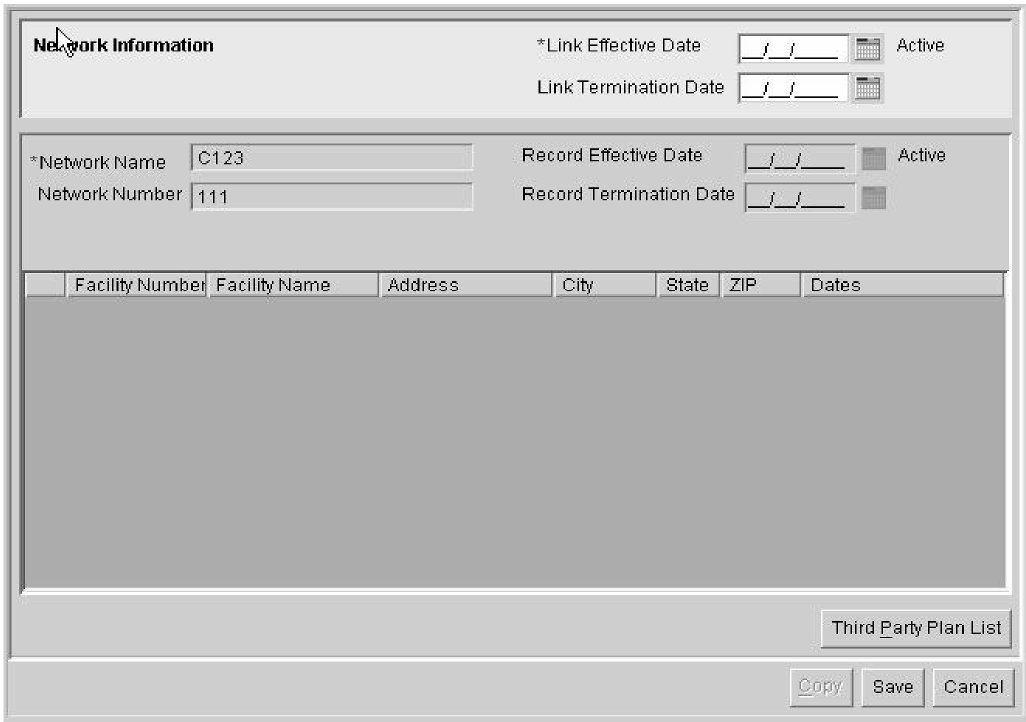
6. To save the linked network, select **Save** (**Enter**).
   The system saves the link and creates nodes under the linked network for the various rule sets.
   Note: To close the **Third Party window** without saving select **Cancel** (**Esc**).

The Network Information Window

When you link an existing network to a plan or select a network node in the plan tree structure, the system displays the **Network Information** window in the right pane of the **Third Party** window.

The **Network Information** window lets you set the **Effective Date** range for the link between the network and the third party plan, and view related information, including identifying information (**Network Name**, and **Network Number**), the **Effective** and **Termination** dates, **Status** on record for the network, and the stores belonging to the network.

Note: The only information you can change is the Effective and Termination Dates for the link and by association, the link’s Status. Once the linked Network is published, you can no longer change the link’s Effective Date.



Elements in the Network Information Window

Element	Description
Network Information	This lets you know you are defining, viewing or modifying information for a linked network.
Link Effective Date	(Required) This is the Effective Date for the link between the network and the third party plan. To set the **Link Effective Date**, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.

Element	Description
Active or **Inactive** indicator	This is either **Active** or **Inactive**, and is the status associated with the **Link Effective** and **Link Termination Dates**. • If the **Link Effective Date** is in the future, the link status is **Inactive**. • If the Link Effective Date is current or in the past, and the **Link Termination Date** is either not set, current, or in the future, the link status is **Active**. • If the **Link Termination Date** is in the past, the link status is **Inactive**. For details go to Setting Effective Dates, Termination Dates, and Status.
Link Termination Date (Tab to the field)	(Optional) This is the Termination Date for the link between the network and the third party plan. It must be the same as or after the **Link Effective Date**. To set the date, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Network Name	This is the name of the linked network. It is set in **Network Administration** and cannot be changed from **Plan Administration**.
Network Number	(Required) This is a user defined number for the network that is set in **Network Administration**. It cannot be changed from **Plan Administration**.

Element	Description
Record Effective Date	This is the Effective Date on record for the network. It is the same as the Effective Date set using the **Network Administration** command, and is the date the network becomes effective. This date cannot be changed from Plan Administration.
Active or **Inactive** indicator	This is either **Active** or **Inactive**, and is the status associated with the **Effective** and **Termination Dates** on record for the network. The **Effective** and **Termination Dates** that define this status are set in **Network Administration**. This status cannot be changed from Plan Administration. • If the effective date is in the future, the status is **Inactive**. • If it is current or in the past, and the termination date is either not set, current, or in the future, the status is **Active**. • If the **Termination Date** is in the past, the status is **Inactive**.
Record Termination Date	This is the Termination Date on record for the network. It is the same as the Termination Date set using the **Network Administration** command, and is the date the network becomes Inactive. This date cannot be changed from Plan Administration.
Third Party Plan List	Select this button to view a list of plans to which the network is linked.
Cancel button (**Esc**)	Select this button to close the current **Third Party** window, and return to the T-Rex One Enterprise system **Home Page**.
Save button (**Enter**)	Select this button to save any changes.

Modifying Linked Network Information or Deleting a Linked Network

The only information you can change from **Plan Administration** for a linked network are the **Link Effective Date**, the **Link Termination Date**, and by association, the **Status**. For details go to Setting Effective Dates, Termination Dates, and Status.

You can delete a linked network any time before you publish it, the plan to which it is linked, or any of its dependent nodes (including rule sets, data filters, or groups belonging the linked network).

The following procedure covers deleting a linked network, and assumes that you have not published the linked network, the plan to which it is linked, or any dependent node.

To Delete a Linked Network:

1. In the tree structure for the current plan, select the network name (linked network node). For details go to Using Tree Structures.
2. Select **Actions** (when the **Actions** menu is active, press the **Spacebar**).
3. In the **Actions** menu, select **Remove** (use the arrow keys to highlight **Remove** and press **Enter**).
   A message reminds you that removing the linked network also removes all data attached to it.
4. To remove the linked network, select **OK** (**Enter**).
   Note: If any of the information attached to the linked network is published, a message informs you that you cannot remove the linked network from the third party plan. Select **OK** (**Enter**) to dismiss the message.
   If you have not published any related information, the T-Rex One Enterprise system removes the linked network from the current plan’s tree structure.

Adding and Maintaining Groups

The topics in this section cover the procedures for the following:

- Adding a group to a plan or a linked network. For details go to Adding a Group.
- Making a copy of a group. For details go to Copying a Group.
- Modifying or deleting a group. For details go to Modifying Group Information or Deleting a Group.
- Setting **Effective**, **Termination** dates, and, by association, its status (**Active** or **Inactive**) for the group and any of its nodes. This means you can activate and

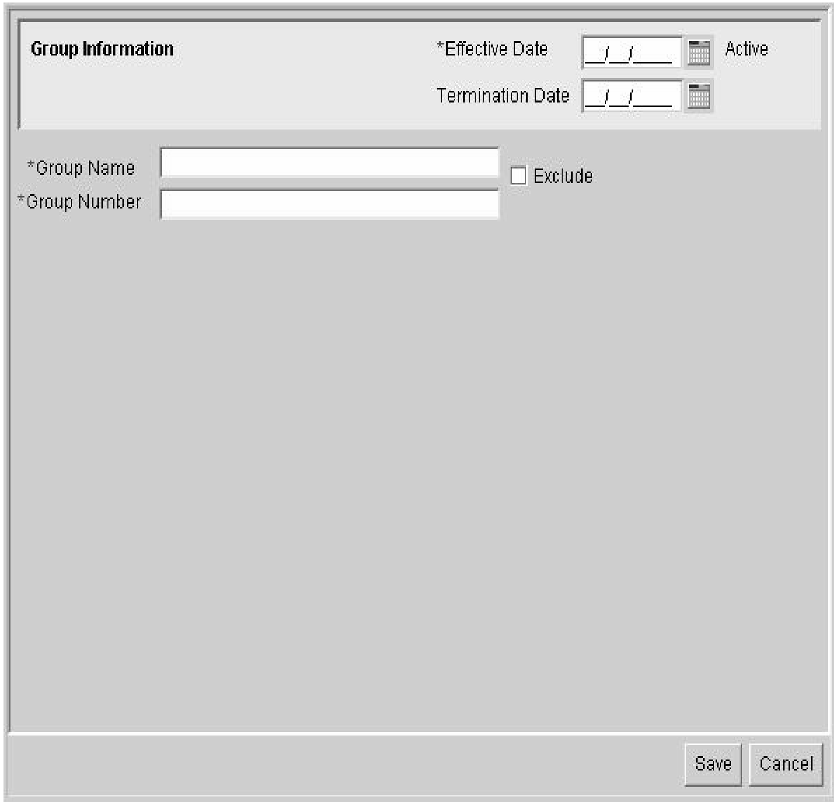
deactivate a group. For details go to Setting Effective Dates, Termination Dates, and Status.

Adding a Group

To add a group to a plan or a linked network:

1. You can either:
   - Add a group to the current plan (at the plan level of the plan tree structure). In the plan tree structure, select the plan name (the plan's root node).
   - Add a group to a network linked to the plan. In the plan tree structure, select the network name (network node of interest).
2. In the **Actions** menu, select **Add**, **Group**. (Tab to the **Actions** menu, press the Spacebar to open the menu. Then, use the Down Arrow key to highlight **Add**. In the Add submenu, use the Down Arrow key to highlight **Group**, and press **Enter**.)
   Depending upon what you selected in Step 1., the system adds a new group to the plan tree structure at the plan or network level, and displays the **Group Information** window.
   Note: For details go to Elements in the Group Information Window.
3. Type or select at least the following information:
   - **Effective Date**.
   - **Group Number.**
4. If appropriate, type or select the following information:
   - **Group Name.**
   - **Termination Date.**
   - **Exclude.**
5. Select **Save** (**Enter**).
   The T-Rex One Enterprise system adds nodes for the various rule sets to the newly added group.
   Note: Select Cancel (Esc) to close the **Third Party** window and return to the T-Rex One Enterprise system **Home Page**.

The Group Information Window



When you add a group to a plan or a linked network, or select a group node in the plan tree structure, the T-Rex One Enterprise system displays the **Group Information** window in the right pane of the **Third Party** window.

The **Group Information** window lets you set the **Effective Date** range and, by association, the **Status** for the group, and identifying information (**Group Name** and **Group Number**) for the group.

Elements in the Group Information Window

Element	Description
Group Information (title)	This lets you know you are defining, viewing or modifying information for a group.

Element	Description
Effective Date	(Required) This is the **Effective Date** for the group. To set the **Effective Date,** type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Active or **Inactive** indicator	This is either **Active** or **Inactive**, and is the status associated with the Effective and Termination Dates. • If the **Effective Date** is in the future, the link status is **Inactive**. • If it is current or in the past, and the **Termination Date** is either not set, current, or in the future, the status is **Active**. • If the **Termination Date** is in the past, the status is **Inactive**. For details go to Setting Effective Dates, Termination Dates, and Status.
Termination Date (Tab to the field)	(Optional) This is the **Termination Date** for the group. It must be the same or after the **Effective Date**. To set the date, type the date, or select the calendar icon, and select the date. For details go to Setting Effective Dates, Termination Dates, and Status.
Group Name	(Optional) This is the name of the group.
Group Number	(Required) This is the ID assigned to the card holder group or the employer group. This number is used when you add information to the **Patient Profile**, **Third Party** tab where it is called **Group ID**.
Cancel button (**Esc**)	Select this button to close the current Third Party window, and return to the T-Rex One Enterprise system **Home Page**.

Element	Description
Save button (**Enter**)	Select this button to save any changes.

Modifying Group Information or Deleting a Group

The following procedure describes how to modify group information or remove a group. It assumes that neither the group nor any of the rule sets or data filters defined for the group are published.

Note: This topic does not describe how to modify any rule sets or data filters defined for a group. For details go to Plan Administration - Setting Up - Overview.

To modify group information or delete a group:

1. In the tree structure for the current plan, select the node for the group of interest (the name of the group). For details go to Using Tree Structures.
2. Do one of the following:
   - Modify **Group Information**, go on to Step 3.
   - Remove the selected group, go on to Step 5.
3. **To modify information,** in the **Group Information** window in the right pane of the **Third Party** window, change the appropriate information. You can change the following:
   - **Effective Date.** This is required information.
   - **Group Number.**
   Note: You cannot change the **Effective Date** or the **Group Number** if the group has been published.
   - **Group Name.**
   - **Termination Date.**
   - **Exclude.**
4. Select **Save** (**Enter**).
   The T-Rex One Enterprise system saves the changes.
5. **To delete a group,** select **Actions** (when the **Actions** menu is active, press **Spacebar**).
6. In the **Actions** menu, select **Remove** (use the arrow keys to highlight **Remove** and press **Enter**).
   Note: A message reminds you that removing the group also removes all data attached to it.

7. To remove the selected group, select **OK** (**Enter**).
   Note: If any of the information attached to the linked group is published, a message informs you that you cannot remove the group from the third party plan.
   If you have not published any related information, the T-Rex One Enterprise system removes the linked network from the current plan's tree structure.

Copying a Group

Before or after a plan or any of its nodes are published, the **Copy** command in the **Actions** menu lets you copy a selected group:

- From the plan level to the network level.
- From the network level to the plan level.
- From one network to another.

So, if Plan X has two networks, Network A and Network B and if a group is underneath Network A, you could create another group with the same settings:

- Underneath Network A.
- Underneath Network B.
- At the plan level of Plan X.

You can only copy within a plan, however, not from plan to plan.

To copy a group:

1. In the tree structure for the current plan, select the group name (the node for the group of interest). For details go to Using Tree Structures.

2. In the **Actions** menu, select **Copy**. (Tab to the **Actions** menu, press the Spacebar to open the menu. Then, use the **Down Arrow** key to highlight **Copy**.)
   The T-Rex One Enterprise system opens the **Copy Group** window. This window shows the plan and the networks under it. By default the selected level is the level where the original group is located.

3. Do one of the following:
   - If you want to place the copy at the level where the original group is located, select **OK** (**Enter**).
   - If you want to place the copy underneath another level, select the node where you want to place the copy, either the root node of the plan or a network node, and then select **OK**. (Use the **Up** and **Down Arrow** keys to move the highlight to appropriate node, and then press **Enter**).

   The T-Rex One Enterprise system redraws the plan tree structure to show the newly created copy. The new copy is selected. By default its name is Copy of <Group Name>.

4. (Required) During the copy, the copied group's Effective Date and Group Number are blanked out. To complete the copy function, if appropriate, type or select the Effective Date and Group Number for the copy, and if appropriate, change the name.

5. Select **Save** (**Enter**).
   Note: You can change any group information, rules or data filters defined for the copy, or delete any rule sets or data filters, as needed.