Operational Procedures

Hotline Staff

Pharmacy Benefits
Management System (PBMS)

Revised 7/26/18

PBMS Operational Procedures – Hotline Staff

Contents

Overview

The Hotline staff's main focus is assisting providers in entering drug Prior Authorization (PAs) requests and answering general Medicaid questions. Questions generally focus on participant eligibility, PA status, and creation of a PA. The Hotline staff will be entering PAs received by phone and fax into the Pharmacy Benefits Management System (PBMS) so they can be adjudicated by the HFS pharmacy staff. When needed, they will also log calls that need to be returned by pharmacy staff.

Key Job Functions

- Take calls from providers and participants related to:
  - PA status
  - Adding a PA
- Enter new PA requests received by fax (Data Entry)
- Communicate with pharmacy staff as needed using the Help Desk Call Log.

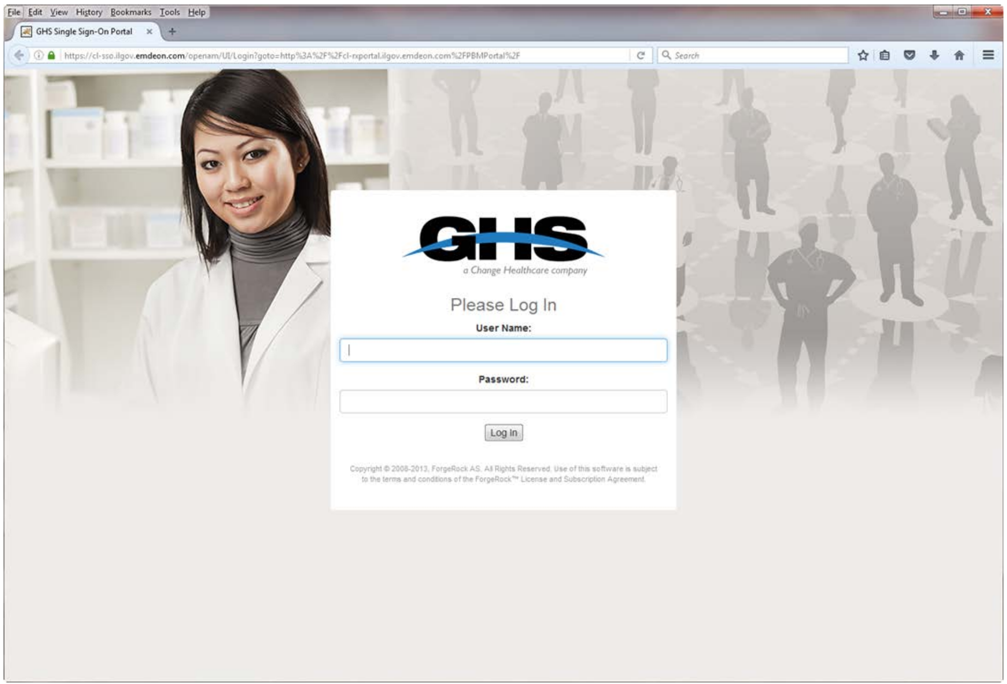
Applications Used

As Hotline staff, you'll be using these programs in the PBMS:

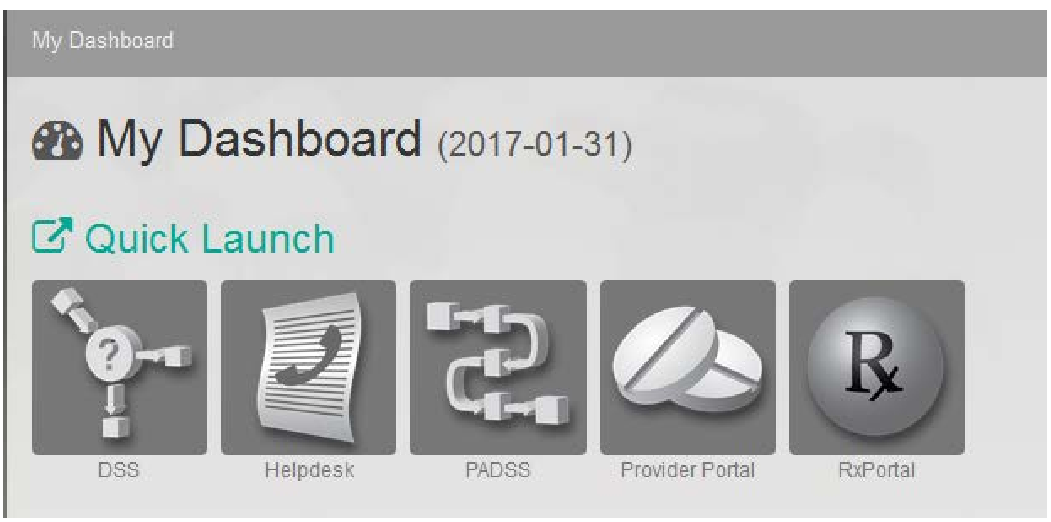
- **PBM Portal** – **Used as a dashboard to access all your applications** in the PBMS with one login.
- **Provider Portal** – **Used to enter phoned-in PAs into the system.** This is also the PBMS' external website where pharmacies and prescribers can access participant info, including eligibility information, drug history, PA status and history. Providers can submit their own PA requests from the Provider Portal, and access the Preferred Drug List (PDL).
- **PADSS (Prior Authorization Decision Support System) – Used by Data Entry staff to key faxed PAs into the system and add a comment to an active PA ticket.** PADSS is used by the pharmacists to manage and process all PAs.
- **Help Desk Call Log (HDCL) –**Used to send a message about a call to a group or individual for follow-up.
- **DSS – (Decision Support System) Used to run quick queries to search for general information on specific claims or participants.** This is a quick way to determine participant eligibility, view specific claims that rejected, view rejection messages, or find details on drug pricing and the preferred drug list (PDL). **There is a one-day lag before any claim information is loaded in DSS. PA info is available immediately.**
- **RX PORTAL – (POS) Used to find information on rejected claims.** Use Rx Portal to check why a claim rejected and find participant and drug details.

Accessing Applications (In PBM Portal)

Log into the system by entering your user name and password.



The applications you can access appear as icons on the screen:

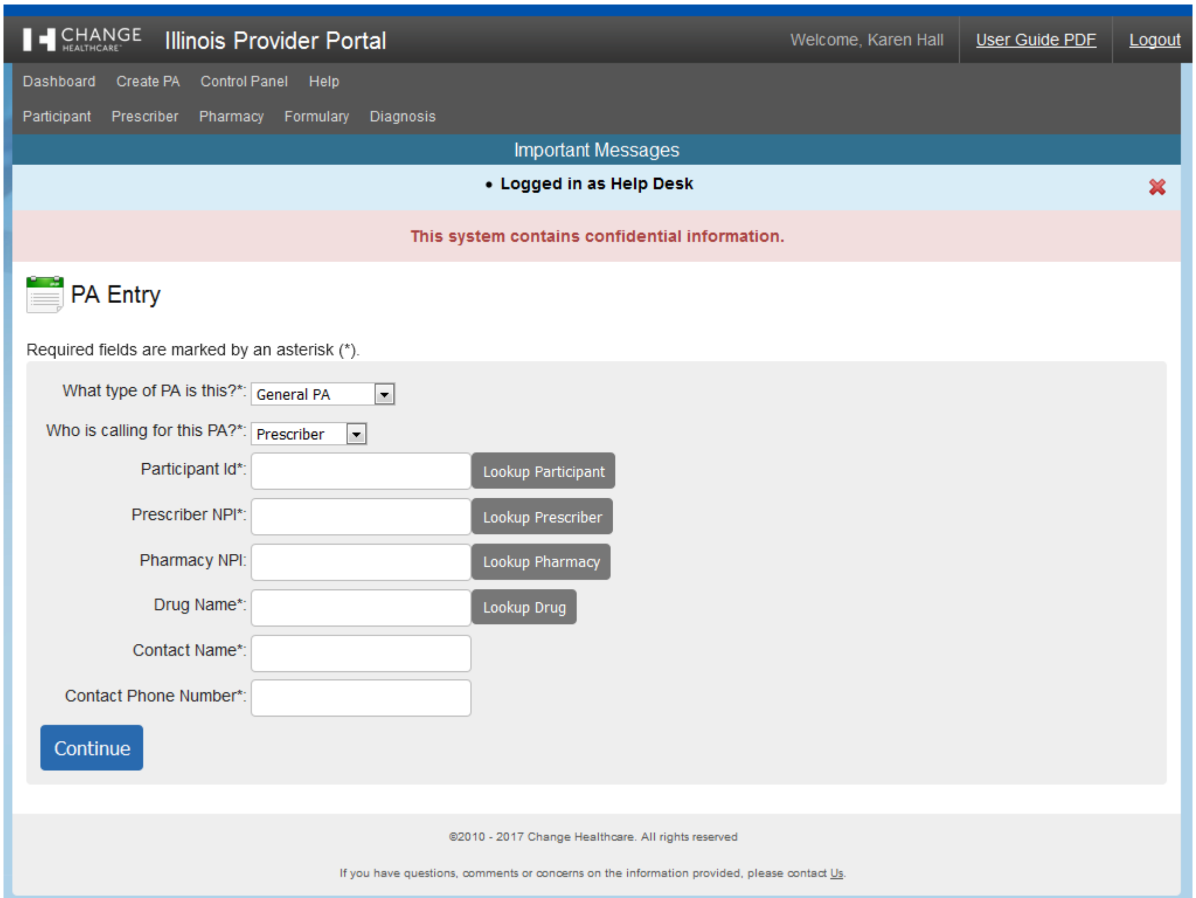


Click on the application you want to access.

ENTERING A PHONED-IN PA REQUEST

Log into the PBM Portal and select the **Provider Portal icon**. 

The first Create PA screen comes up automatically when you start Provider Portal.



The PA entry screen has been streamlined for the hotline to make it faster to enter a PA request.

QUICK STEPS to Entering a Phoned-In PA Request

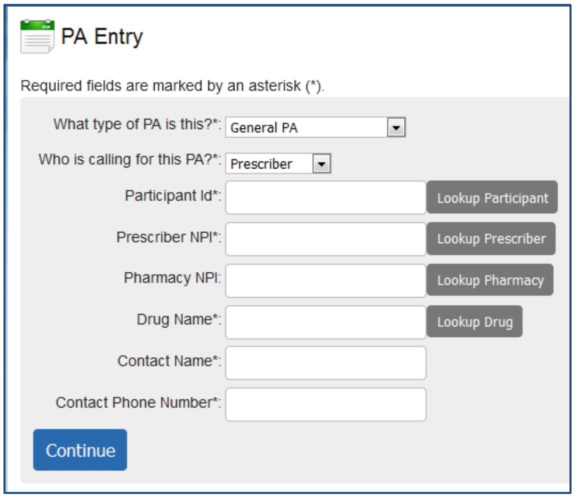
1. Open Provider Portal and click on **Create PA**.
2. **Screen 1-** Enter the key contact information and drug requested.
3. **Screen 2-** Enter the details about the diagnosis, drug, and any clinical information requested. This screen will change depending on which PA form is used to submit request.
4. **Submit the PA request**, fixing any errors that may occur when information is missing or entered incorrectly.

Once the PA request has been submitted, the PA will be sent to the PADSS application and assigned a ticket number. The HFS pharmacists use PADSS to approve or deny the PA request, and faxed in PA requests are entered in PADSS.

The following pages give the details of entering a Phoned-In PA Request:

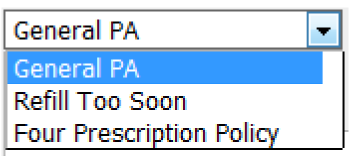
Screen 1 - Entering Basic PA Info

- Click **Create PA** from the menu bar and the PA Entry screen appears:

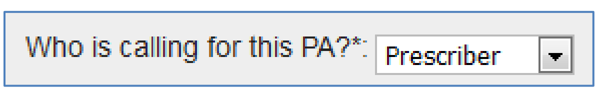


All the fields on the screen are required except Pharmacy NPI.

Type of PA – Accept the default of General PA form. You can choose a different PA form later in the process.



Who is calling for this PA?



- Selecting **Prescriber** lets you type the drug name below.
- Selecting **Pharmacist** lets you type the drug's NDC number below. It is always better to add the NDC # if you can get it from the caller.

For the Participant, Prescriber, Pharmacy, and Drug Name fields, you can type the info into the field or click the Lookup Button.

If you have already entered a PA, some these fields may already be filled in with the previous information. You can type over the information or do a new lookup.

NOTE: Do NOT click the ENTER key to move to the next field or screen. Use the TAB key instead, and click the CONTINUE button to move to the next page.

Participant Lookup

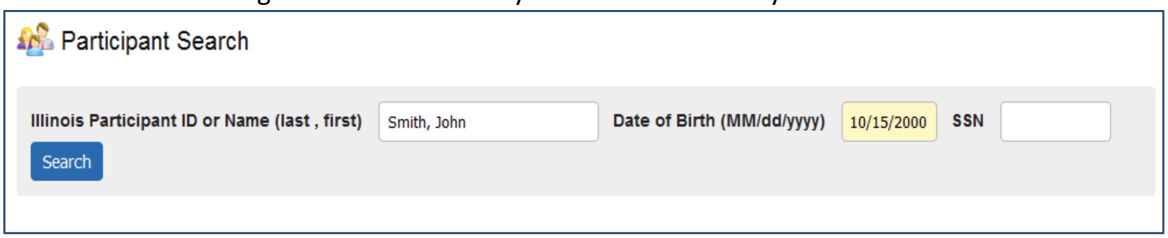
Participant ID - Type **the Participant's Medicaid ID # in the field if possible.** You can also do a lookup by a combination of **Name, Birthdate and SSN**. The criteria you enter for a participant search must be narrow enough to find just this one person.

For example- If you just search for Smith, John:

A large number of records would meet the criteria and you will get the following error message:

You have exceeded the maximum number of allowed results. Please refine your search and try again

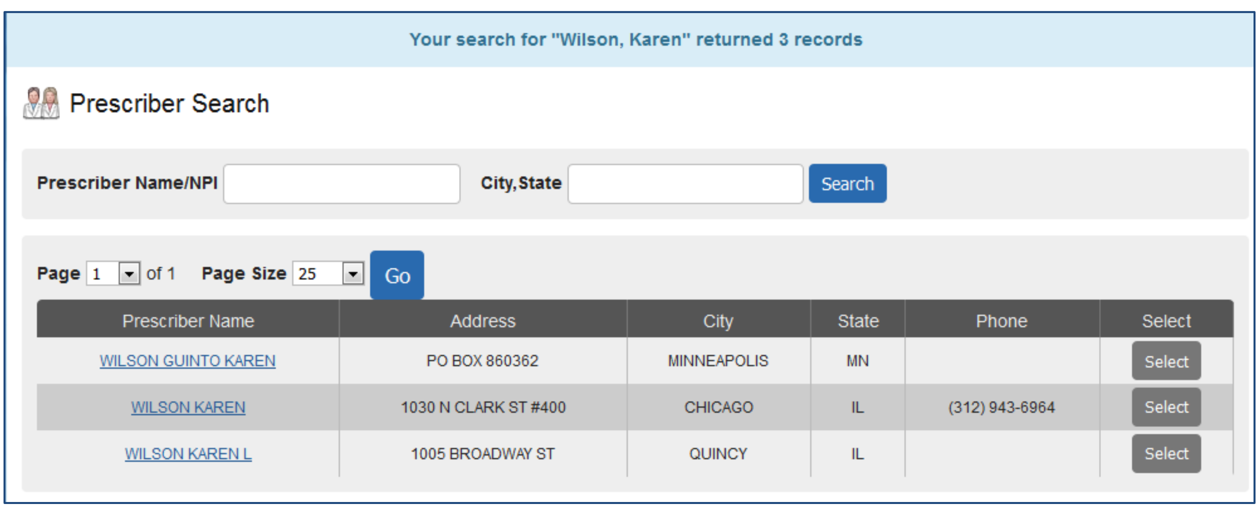
You have to enter enough information so only the one John Smith you need is found in the search.



Prescriber and Pharmacy Lookup

- **Prescriber NPI -** For this search you can enter **Last, First Name** and choose the prescriber from a list of names. Click the **Select** button to add them to the PA.

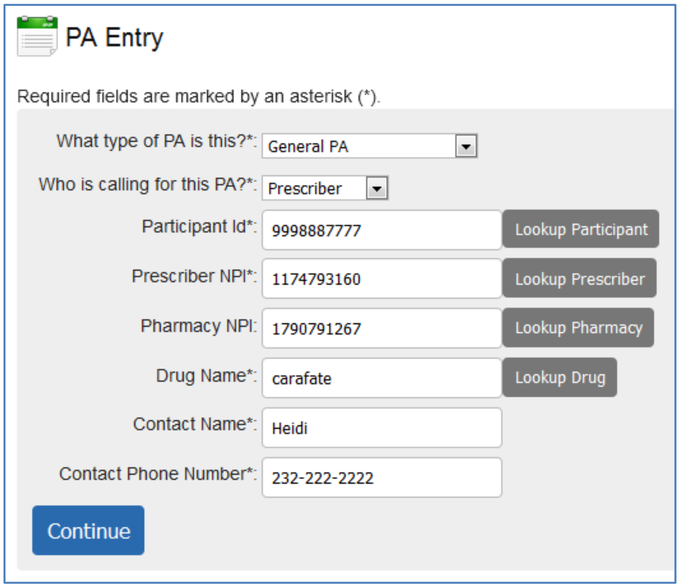
NOTE: the Prescriber must be a valid provider in the IMPACT system or this PA request cannot be completed. (This requirement was turned off at go live- 3/27/17 and has not been turned back on to date. The Provider must have a valid NPI #, but they do not have to be registered in IMPACT)



- **Pharmacy NPI** (This field is optional) – This search works the same way as the Prescriber search.

Drug Lookup

- Type in the **Drug Name** or **NDC**.


PA Entry

Required fields are marked by an asterisk (*).

What type of PA is this?*: General PA

Who is calling for this PA?*: Prescriber

Participant Id*: 9998887777 Lookup Participant

Prescriber NPI*: 1174793160 Lookup Prescriber

Pharmacy NPI: 1790791267 Lookup Pharmacy

Drug Name*: carafate Lookup Drug

Contact Name*: Heidi

Contact Phone Number*: 232-222-2222

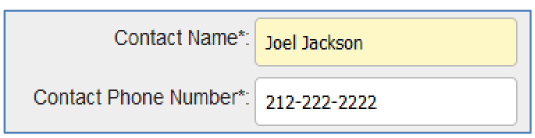
Continue

Note: Clicking the **Lookup Drug** button takes you to a drug search screen where you can see the requested drug and a list of alternatives. If you **type the drug name and click Continue**, you will only get a list of the specific drug requested.

You can select or confirm the drug on Screen #2.

Contact Name and Phone

- Enter the last two fields- **Contact Name** and **Contact Phone Number** from the caller.

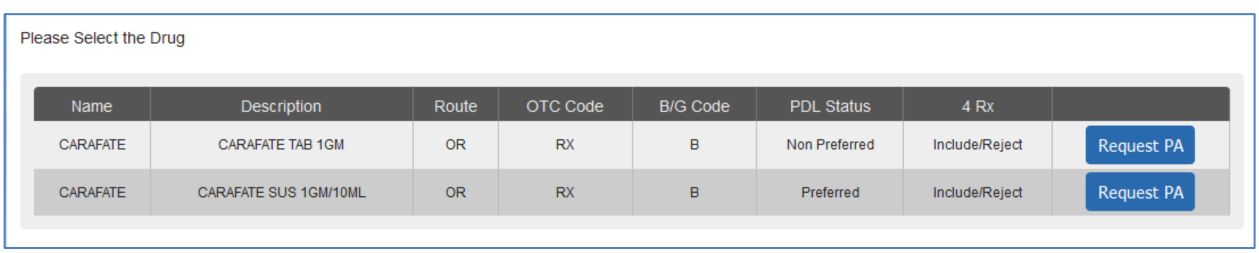

Contact Name*: Joel Jackson

Contact Phone Number*: 212-222-2222

NOTE: These are required and you'll get an error message if they are left blank.

Selecting the Drug

- When you click **Continue**, it will take you to the **Formulary** drug lookup screen.


Please Select the Drug

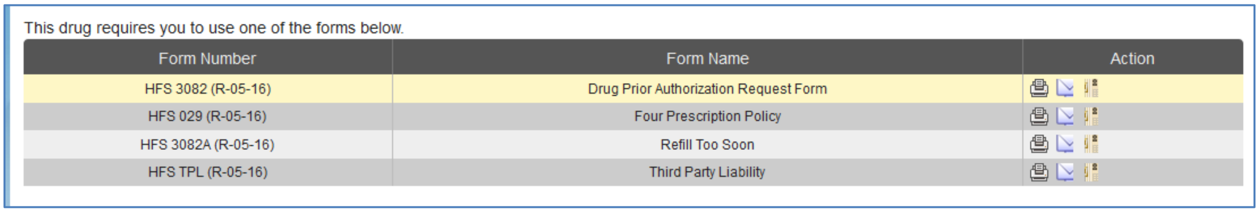
Name	Description	Route	OTC Code	B/G Code	PDL Status	4 Rx	
CARAFATE	CARAFATE TAB 1GM	OR	RX	B	Non Preferred	Include/Reject	Request PA
CARAFATE	CARAFATE SUS 1GM/10ML	OR	RX	B	Preferred	Include/Reject	Request PA

- If you entered the **drug name**, all drugs with that name will display.

- If you entered the **drug NDC**, the specific drug will appear.
- Click the **Request PA** button to select a drug.

Selecting the Correct PA Form

- Next, you'll see a list of PA forms that can be used for this drug:



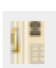
This drug requires you to use one of the forms below.

Form Number	Form Name	Action
HFS 3082 (R-05-16)	Drug Prior Authorization Request Form	
HFS 029 (R-05-16)	Four Prescription Policy	
HFS 3082A (R-05-16)	Refill Too Soon	
HFS TPL (R-05-16)	Third Party Liability	

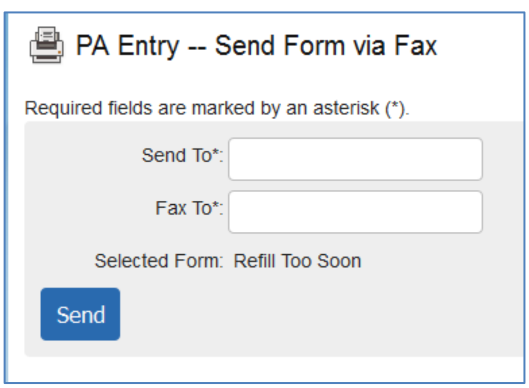
- **Select a PA form to complete from the list.** The list of forms changes based on the selected drug. Most of the time you will be using the Drug Prior Authorization Request Form.
- A pharmacy will often submit a PA because they submitted a claim and it was rejected. They receive a message indicating why the claim was rejected, so they should know what type of PA form they need.

Here's a list of common rejection messages and the type of PA that would be required:

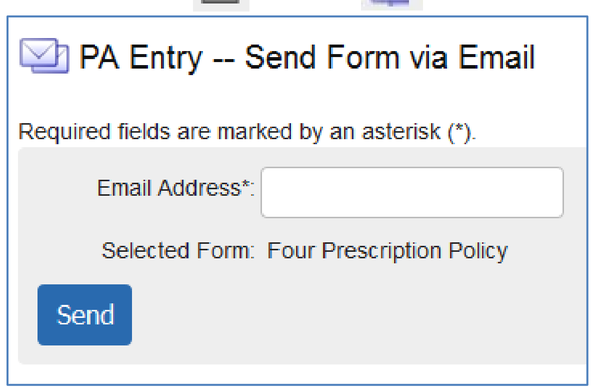
Rejection Message	PA Form to Use:
75 – PA required	Drug Prior Authorization Request Form
76 – Plan limit exceeded	Four Prescription Policy
79 – Refill too Soon	Refill to Soon
41 – Submit Bill to Other Processor or Primary Payer	Third Party Liability

-  **Click this icon to continue entering an online form.**

You can also send a copy of the PA form to the caller by clicking fax  or email. 



or



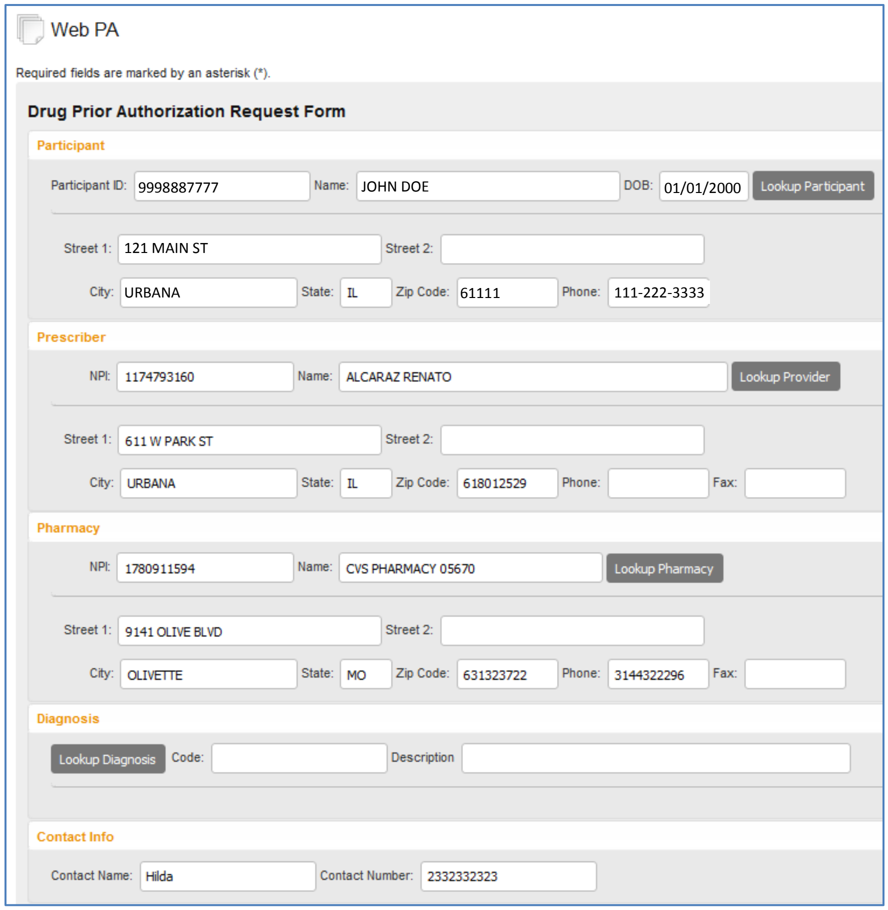
If you choose to complete an online form, that form will now appear on screen.

Screen 2 – Drug PA Form

The second screen is an electronic copy of the selected PA form.

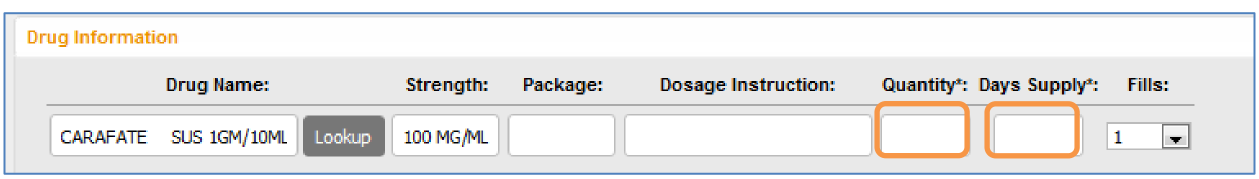
- **All the information entered on the previous screen will carry over to this screen.** You can change the information by clicking on a Lookup button.
- **Diagnosis Code– This code is optional.** You must click the Lookup Diagnosis button to enter a diagnosis code. When searching, you can enter the code or type a description and click **Search**.

  If you aren't given a specific code to lookup, **you can also type the description in the last text field at the bottom of the form.**



Drug Information – The **drug name, strength, and package is prefilled** from the previous page.

- You can change the drug by clicking the Lookup button.



- **Dosage instructions are optional**, but helpful.
- **Quantity and days' supply are required.**
- **Fills** must be at least 1.

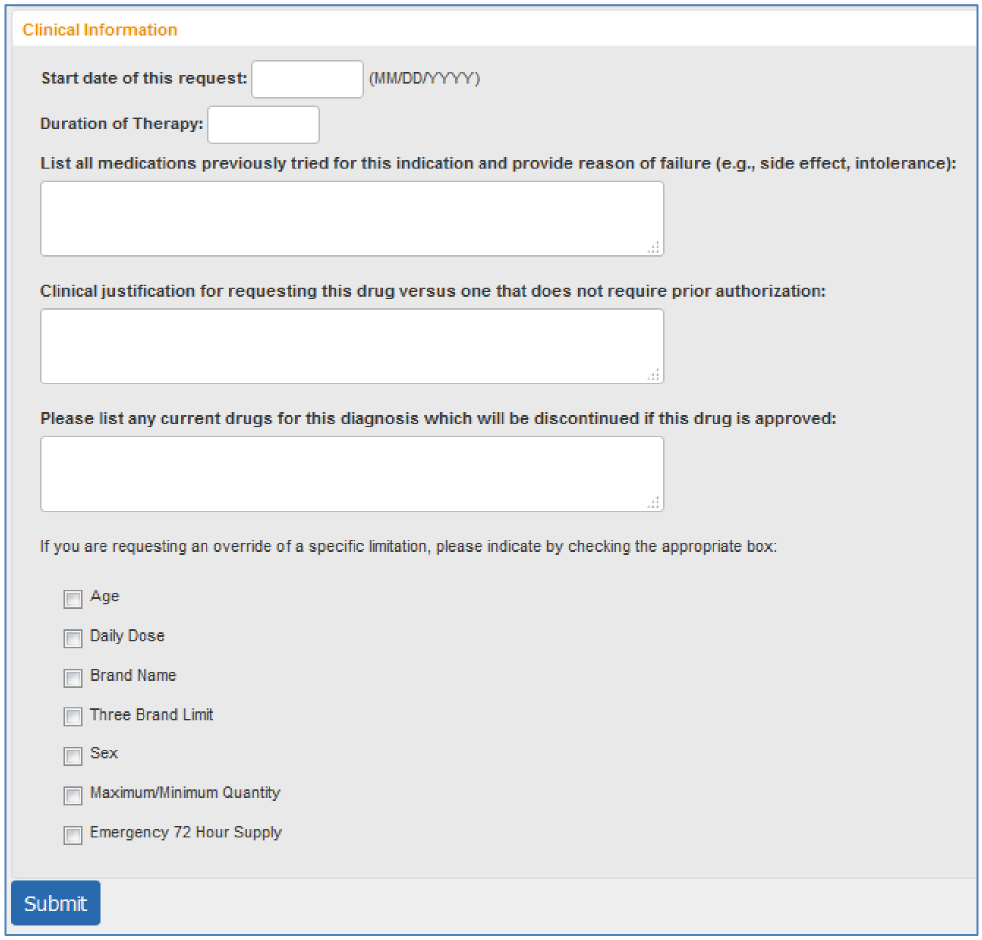
Clinical Information

This part of the screen will be different depending on the PA form selected. It contains additional information used by the clinical pharmacists to make a determination to approve or deny the PA request. **Any required fields will be marked with an asterisk. (*)**

Fill in the requested info

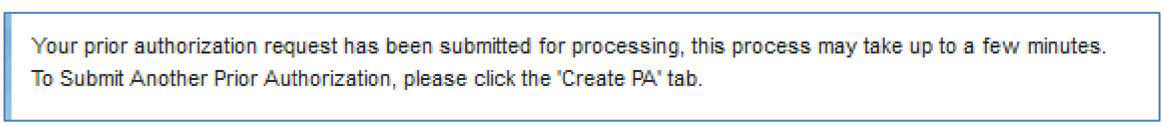
- **Start date of request**– If you leave this field blank, the PA will default to today's date.
- **Additional info**
- **Specific overrides–** These can be helpful but are not required.

Click the **Submit** button to process the PA request.



Successful Submission

A message appears when the PA has been successfully submitted.

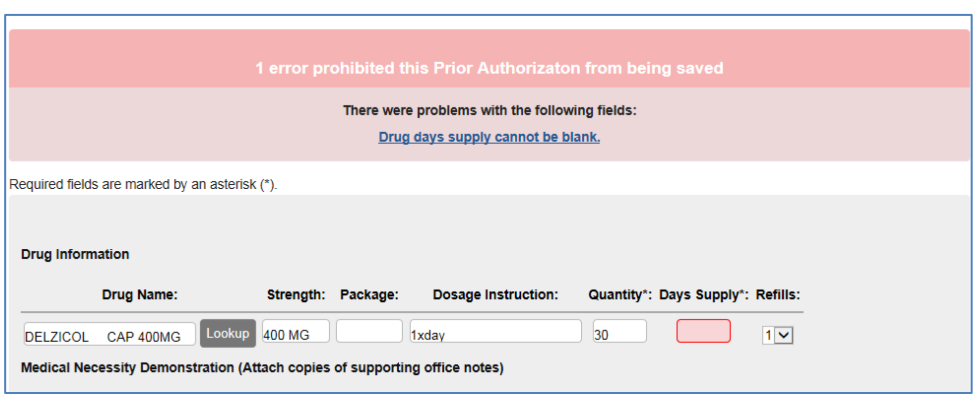


Error Messages When Submitting a PA Request

Error messages will appear if required information is missing or incorrect. Click on each error message to go to the field to be corrected.

Make any changes, and then click **Submit**.

Continue correcting errors until you see the message that the PA has been submitted for processing.

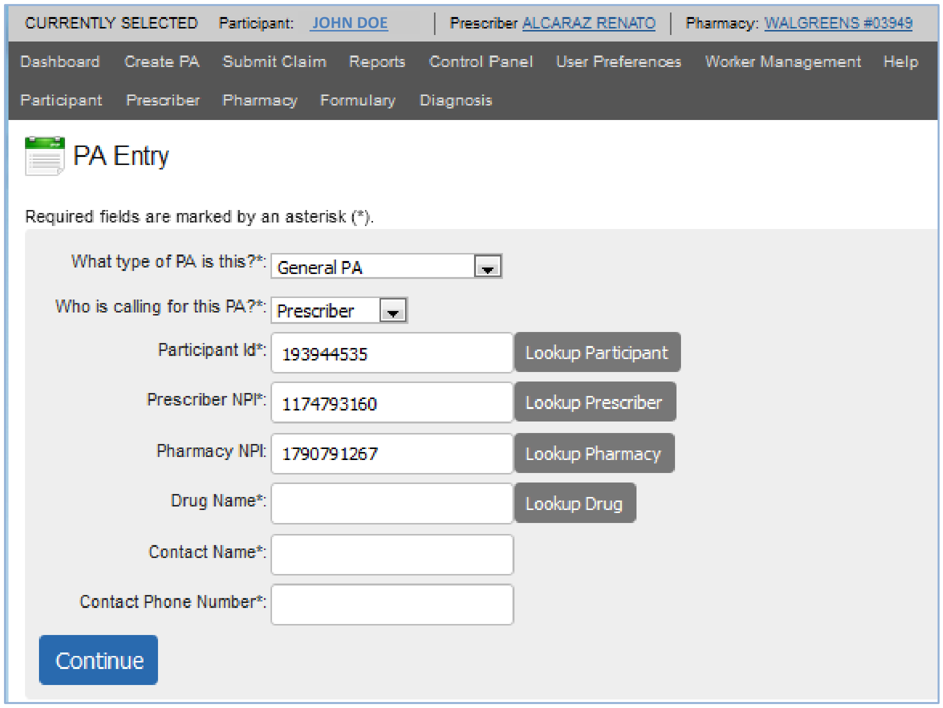


Entering Additional PAs

You can continue to submit new PAs for the provider.

- When you click on **Create PA** from the menu bar, the **Participant**, **Prescriber** and **Pharmacy will be automatically filled into the PA Entry fields.**

- **To clear out saved information:** Click the hyperlink for a field on the **CURRENTLY SELECTED** line above the menu bar. On the selected page, click **Clear**.



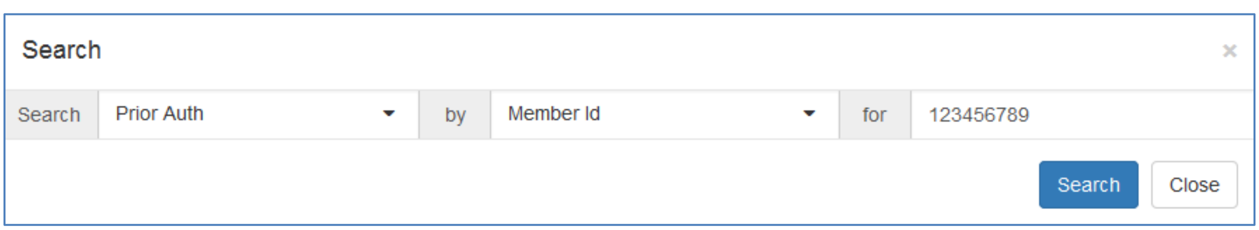
Note: this works for every selected link except the Prescriber. You cannot clear this field. You must type in a new prescriber NPI or do a new prescriber search.

Updating information on a PA Request

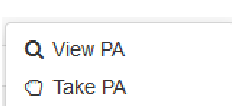
You entered a PA request for someone this morning in Provider Portal. This afternoon they call back to give you additional details for the request. How do you add the information to the PA request?

Follow these steps to look up the PA ticket in PADSS and add a comment to the ticket.

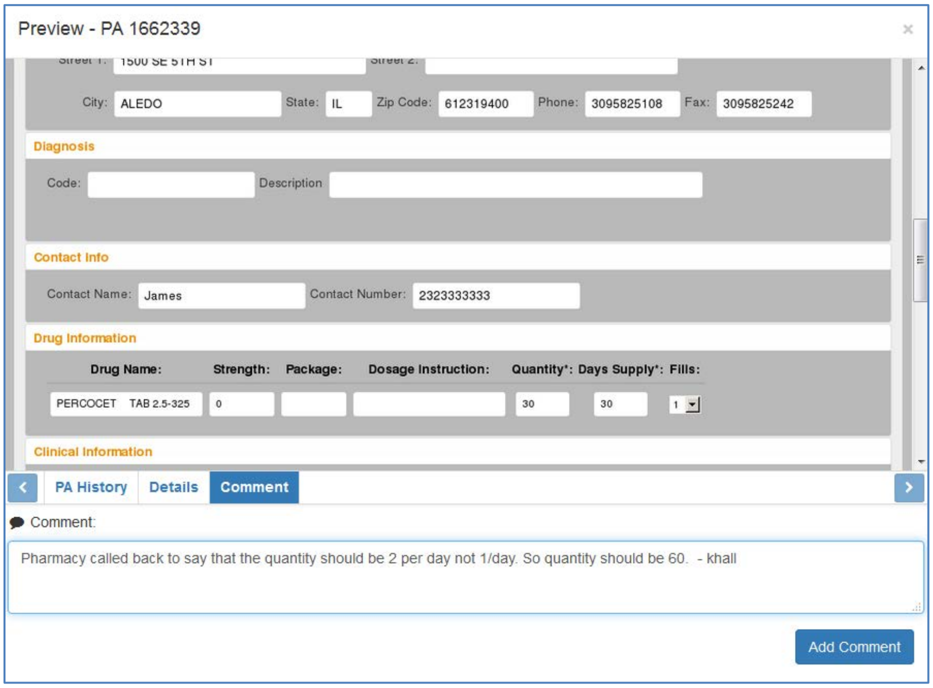
1. Open PADSS and click **Search** on the main menu bar.
2. Click on the first dropdown box and select **Prior Auth**. Click in the second dropdown box and slect **Member ID.** In the third box, enter the **Participant ID #**. Then click **Search**.



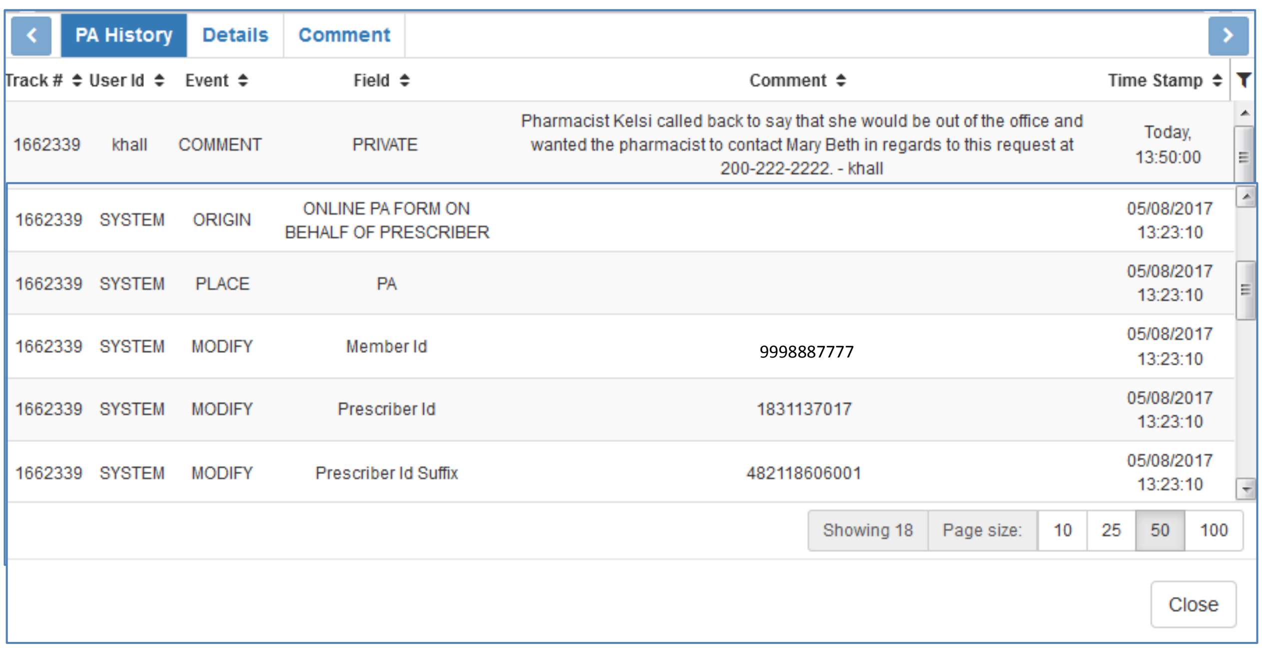
3. A list of PA tickets for this Participant are displayed at the bottom of the screen. Use the scroll bar to move left and right to see additional information, including the status of the PA and current queue. Find the correct PA and **right-click** anywhere on that line. A pop-up box appears. Select the **View PA** option.



4. The view PA screen shows an image of the PA form and a detailed history of this PA ticket. Click the **Comment tab** to add a comment.



5. Enter your detailed comment, adding your intials or user name to the comment. Click the **Add Comment** button to continue.



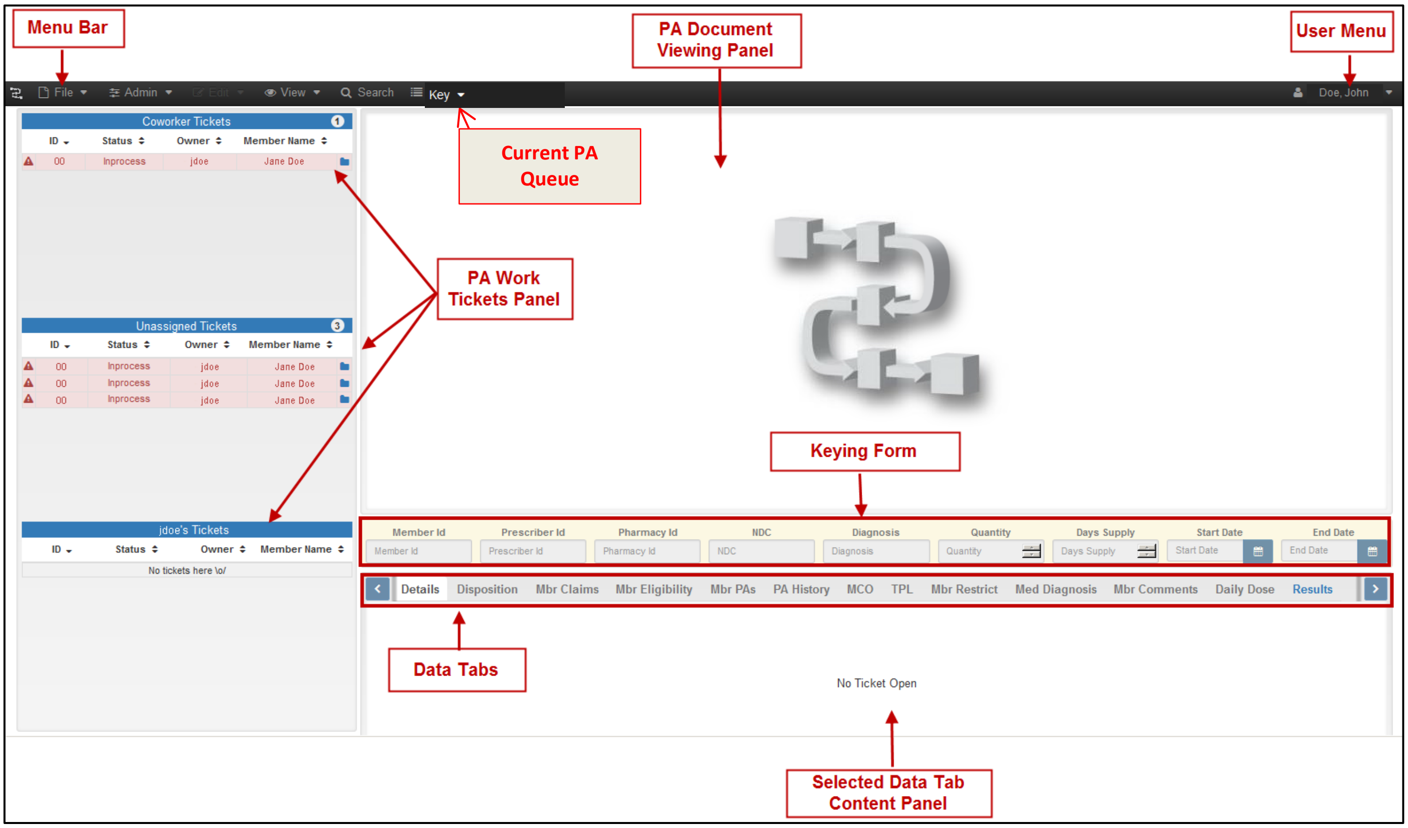
ENTERING A FAXED-IN PA IN PADSS

Faxed in PAs are entered in PADSS. You also use Rx Portal to pull up claims and find information to reference when entering the PA.

From the PBM Portal, open **PADSS** and **Rx Portal**. Move the Rx Portal tab to your second monitor. You will keep it open for looking up information while entering information on the PADSS screen.

Here's an overview of the PADSS Main Screen

PADSS Main Screen



Menu Bar: Shows the current Queue displays in the PA Work Tickets Panel. **Your screen should show the Key Queue.** This is the queue where all faxed PAs are held for data entry. You can also use the Search feature to add a comment to a previously entered PA ticket.

PA Work Tickets Panel:

This shows all the PAs in the Key queue, sorted by Coworker Tickets, Unassigned Tickets, and Your Tickets currently in process. You begin the process by taking the first Unassigned Ticket.

PA Document Viewing Panel:
The faxed PA document appears at the top of the screen.

Keying Form:
You will enter data from the PA document into these fields in the record. These fields are color coded – **Tan** means it hasn't been filled in yet. **Green** means the field is filled out correctly. **Red** means data is missing or incorrect. The fields correspond to the Data Tabs below.

Data Tabs and **Selected Data Tab Content Panel:**
Shows details about the participant and the current PA ticket

You will be working only with the ***Details*** and ***Disposition*** tabs.

QUICK STEPS to Entering a Faxed-In PA Request in PADSS

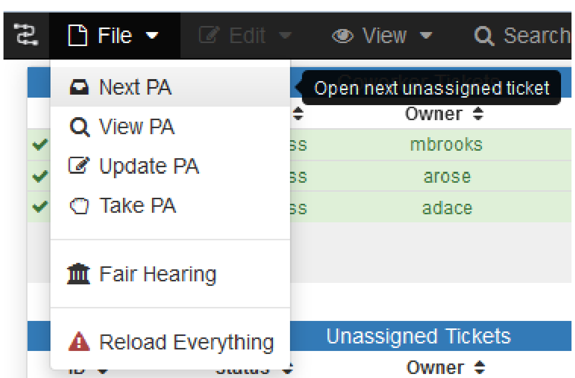
1. **Open PADSS**. You will be in the Key queue.
2. **Open Rx Portal** and move the browser tab to your second screen.
3. In PADSS, **take the first Unassigned Ticket** by clicking on the file ion.
4. The PA image appears at the top of the screen. **Review all the pages in the PA** and decide if the PA needs to be split into multiple tickets, or is unreadable. **Split the PA into multiple tickets or send a fax back if needed.**
5. **Enter data** from the fields of the PA image into the Key Fields row under the PA image.
6. **If you need more information to complete the Key Fields, go into Rx Portal**, go to Claims, Search for Claims and enter the participant's ID # under Advanced Search. Clear out the adjudication data and press Search. The results display all claims submitted for the participant. Look for a rejected claim that matches the information in the PA form, and **copy/paste information on the Rx Portal screen to enter the drug NDC and any additional information needed.**
7. **Move the PA ticket to the appropriate queue** by clicking the Disposition tab, entering any comments needed, selecting the correct PA queue from the dropdown list and clicking Submit.

The following pages give the details of entering a Faxed-In PA Request:

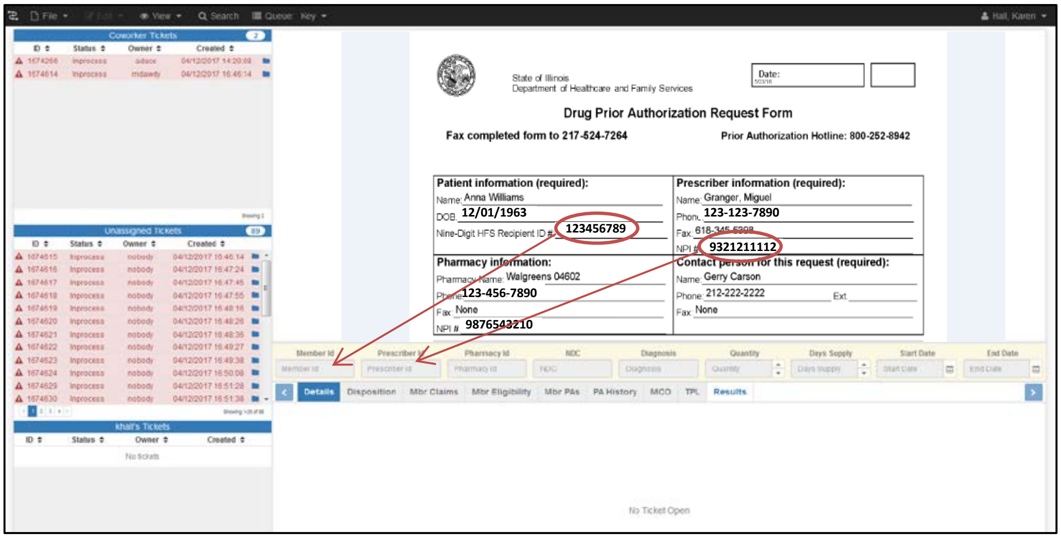
Selecting a PA Ticket

The main menu bar should be showing the **Key Queue** as the active queue. Incoming faxed PAs display in the Key queue.

Take a PA – From the menu, click **File**, then click Next PA, or click the file icon next to the first PA in the Unassigned Tickets section.



The faxed PA form displays at the top of the screen. You can use the scroll bar to move around in the form. You need to key the information from the form into the data fields below the form, or copy and paste information from the Rx Portal screen.

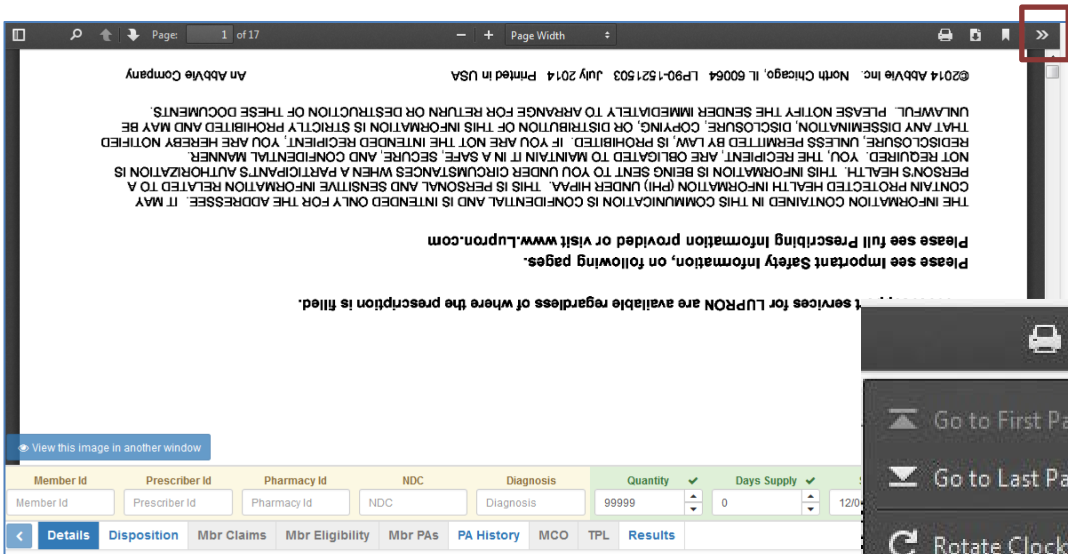


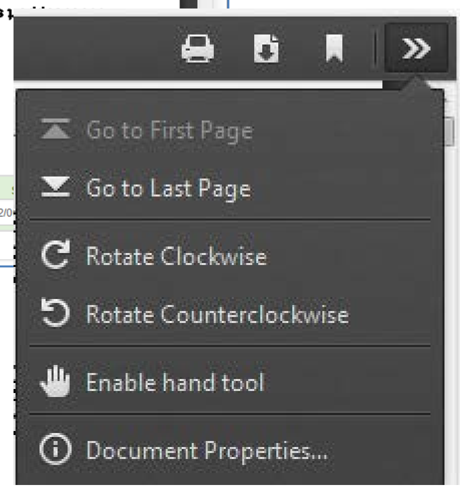
Review the Pages in the Fax

Types of information received:	How it's processed:
PA forms – different types of forms Most PAs use the Drug PA Request Form. Other PA forms may be directed to different queues for processing.	▪ Information is keyed in from the form or copied from denied claims in Rx Portal. Then the PA is moved to another queue for processing using the Determination tab. • Send to 4 Script • Send to Hemophilia • Send to Prior Authorization • Send to Refill too Soon • Send to Special PA Forms • Send to TPL
Multiple forms – some providers will submit multiple PA forms in one fax.	▪ **PAs with multiple forms are copied or split into separate tickets and then moved to the correct queue**
Additional information submitted to support a PA request – Lab results, reports, etc.	▪ Support information is moved to the **Special PA Forms queue**
Unreadable or missing information	▪ **Fax Back** message is sent if fax number is known • Includes a comment to indicate what is missing • You can fax specific PA forms back with the message • The fax they receive includes a copy of the fax that was sent. ▪ **Admin Close** if fax is unreadable

Shifting an upside-down fax image

Occasionally a fax will come in upside down. To rotate the pages of the fax, click on the **>> icon** at the top left of the window to open a dropdown list of options.



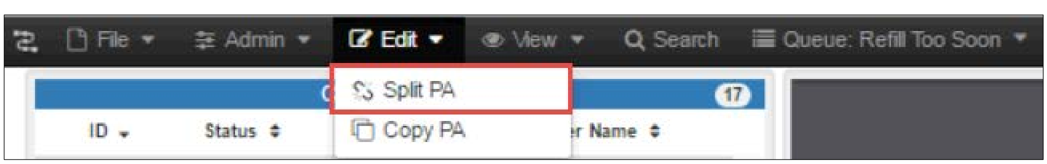


Rotate the current page by clicking **Rotate Clockwise** or **Rotate Counterclockwise**.

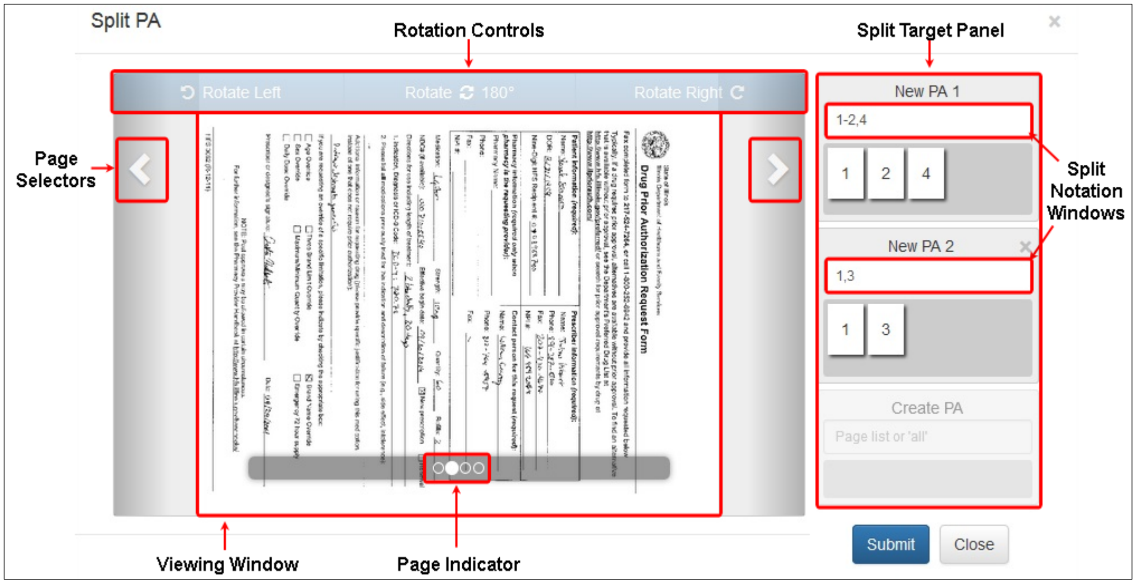
Splitting a fax into multiple tickets

If a ticket contains multiple PA requests, they should be broken out into individual tickets. Pull up the ticket and enter any common information shared by the new tickets in the key field, (like Member ID and/or prescriber) then follow these steps:

1. Click the *Edit* tab in the Menu Bar.
2. Select *Split PA* from the drop-down menu.



The Split PA screen appears:



3. You can view the different pages of the PA by clicking the left and right arrows. **You need to move pages to create new PA tickets.** The original ticket will be closed when the split is compete, so you need to move all the pages to new tickets. An individual page can be added to multiple new tickets. (The fax cover sheet should be added to each ticket.)

   To move a page of the current ticket to a new ticket, click and drag the current page over to the **Create PA** window to the right of the image. You can also type the page numbers you want in the new ticket, by entering a number range (ie: 1-4) and/or with page number separated by a comma (1,5,6) – or (1,5-7). After you start entering the first new ticket, another **New PA** field appears so you can move your pages into additional tickets.

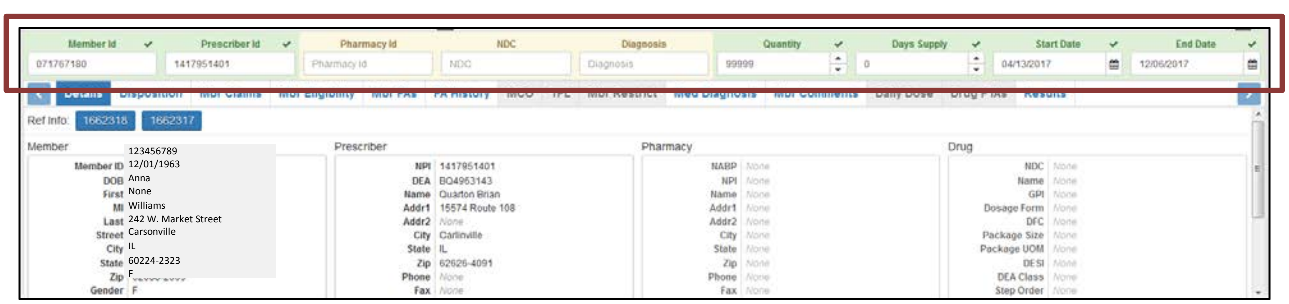
4. Once you've moved all the pages to new tickets, click the **Submit** button to save the tickets.

   The new tickets will appear in your portion of the PA Work Tickets panel. Verify the new PAs have been created. *Note:* The split PAs will receive new numbers and be treated as new PA requests.

5. Verify the new PA(s) contain the information from the original PA and confirm the original PA has been closed.

Keying in Information on the Details Tab

You'll be entering the information from the PA form into the Keying area. **Complete as many fields as possible.** As you enter a field, the corresponding details will display below. The fields will change color to **green** when the field is correctly filled. **Red** fields have a problem with the information entered. You need to fix it before you can finish the PA.



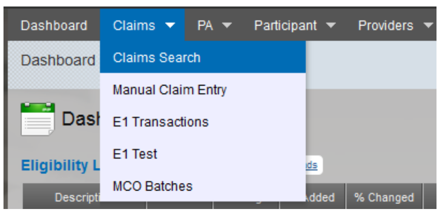
Enter the following fields:

- Participant ID
- Prescriber ID
- Pharmacy ID (if provided)
- NDC code of a Drug (if known)
- Diagnosis (if known)
- Quantity (leave defaulted to 0)
- Days Supply (leave defaulted to 99999)
- Start Date (defaults to current date)
- End Date (defaults to 1 year from current date)

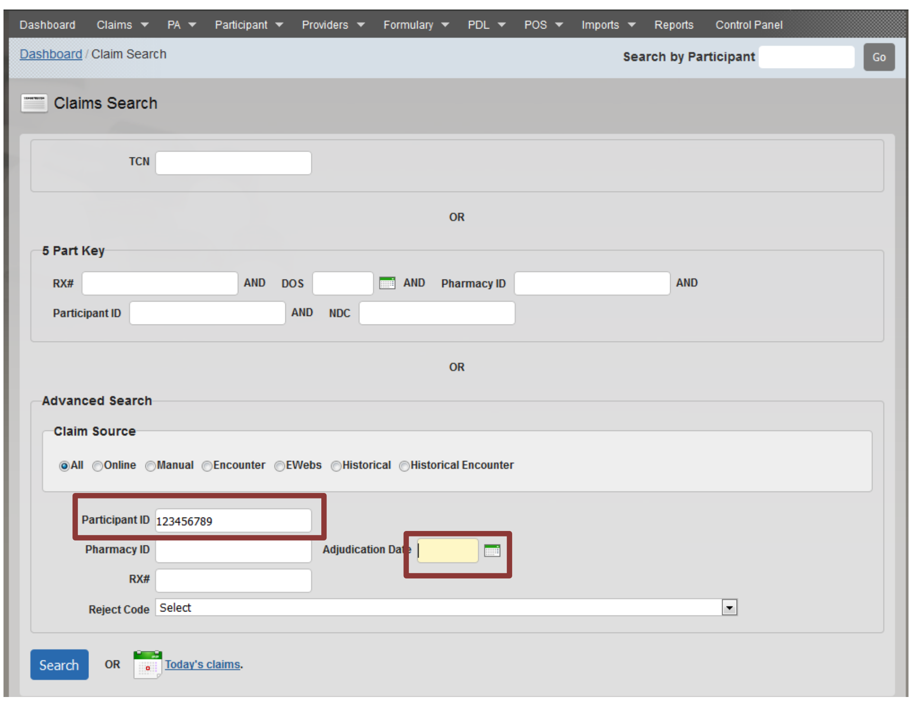
Use Rx Portal to Find More Info for a PA

Many providers fax in a PA request because they submitted a claim and it was rejected. You can search for these rejected claims and copy/paste the information submitted by the provider to make sure the most accurate information is entered on the PA in PADSS.

From the Rx Portal menu, choose **Claims**, and then **Claims Search.**



Look for any rejected claims related to this PA request. Under the Advanced Search, enter the Participant ID from the PADSS PA ticket, clear out the Adjudication Date field, and press the **Search** button.



Scroll down on the screen to see all the claims submitted for this participant:

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Claim ID	Line	Recv Date	Recv Time	Rx Num	DOS	Status	Pharmacy	NDC	Description	QTY	DS
20171001500000701	15	04/10/2017	11:11:18	0009558	02/03/2017	Rejected - 79	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	30.0	30
20171001500000601	15	04/10/2017	11:11:05	0009558	02/14/2017	Reversed	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	-30.0	30
20171001500000501	15	04/10/2017	11:10:52	0009558	02/14/2017	Accepted	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	30.0	30
20171001500000401	15	04/10/2017	11:10:32	0009558	04/10/2017	Reversed	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	-30.0	30
20171001500000301	15	04/10/2017	11:10:22	0009558	04/10/2017	Accepted	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	30.0	30
20171001500000201	15	04/10/2017	11:09:16	0009558	02/01/2017	Accepted	KMART STORES OF IL LLC	61442010301	DICLOFENAC TAB 75MG	15.0	15
20171001500000101	15	04/10/2017	11:09:03	0009558	02/01/2017	Rejected - 60	KMART STORES OF IL LLC	00093435905	CLOZAPINE TAB 25MG	15.0	15

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Use the following fields to match up the rejected claims to the information on the PA request:

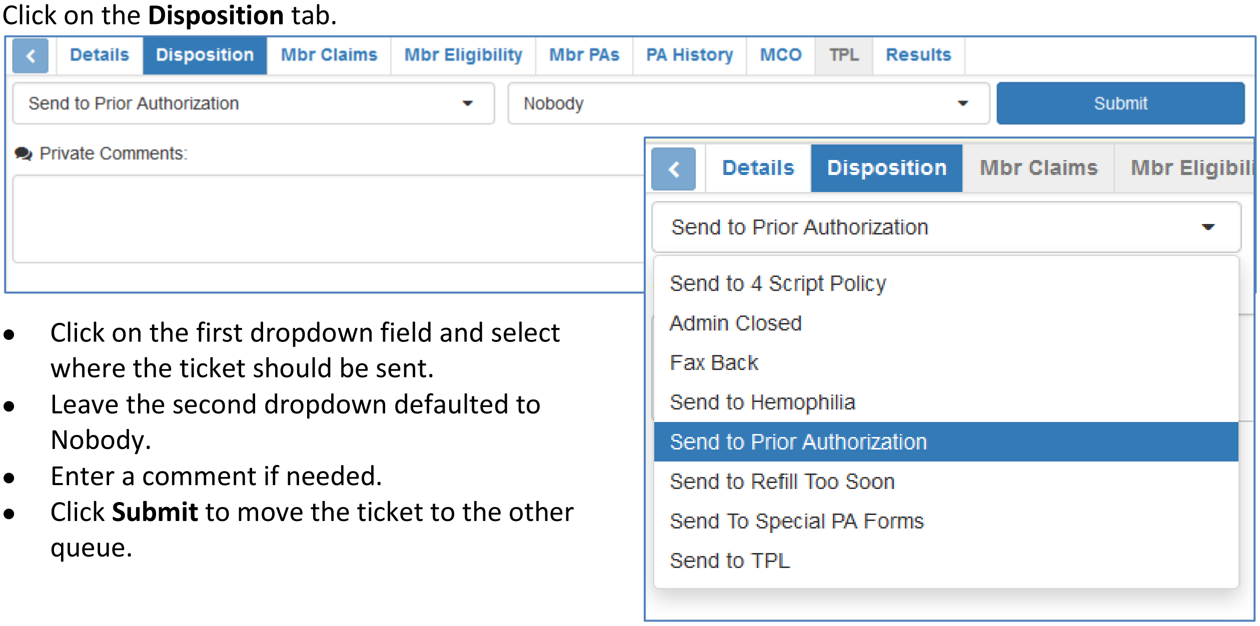
Status: If the claim was accepted, rejected or reversed.
Received Date: When the claim was submitted
NDC: The specific drug code
Description: The drug and dosage
Qty: Quantity requested
DS: Days supply requested

You can click on the Claim ID hyperlink to see more details on the transaction. **If you find a claim that matches the PA request, you can copy and paste fields from the Rx Portal to the key fields in the PADSS ticket.**

Sending the PA Ticket to a Queue

Once all the information is entered into the key fields, you will move the ticket from the Key queue into another queue based on the type of PA form completed.

Click on the **Disposition** tab.



- Click on the first dropdown field and select where the ticket should be sent.
- Leave the second dropdown defaulted to Nobody.
- Enter a comment if needed.
- Click **Submit** to move the ticket to the other queue.

Where to send tickets

Information	Disposition Option
PA forms – Depends on type of PA form and reason for claim rejection. • Standard forms go to the Prior Authorization queue. • TPL forms and claims rejected for TPL go to TPL	▪ Send to 4 Script (not in active use as of 5/8/17) ▪ Send to Hemophilia (Blood Factor PA) ▪ Send to Prior Authorization (standard PA form) ▪ Send to Refill too Soon (RTS form) ▪ Send to Special PA Forms (All specialty forms) ▪ Send to TPL (TPL forms)
Additional information submitted to support PA requests – Lab results, reports, etc.	▪ All supporting information is moved to the **Special PA Forms queue**
Unreadable or missing information	▪ **Fax Back** message is sent if fax number is known • You can fax specific PA forms back with the message • The fax they receive includes a copy of the fax that was sent. ▪ **Admin Close** if fax is unreadable

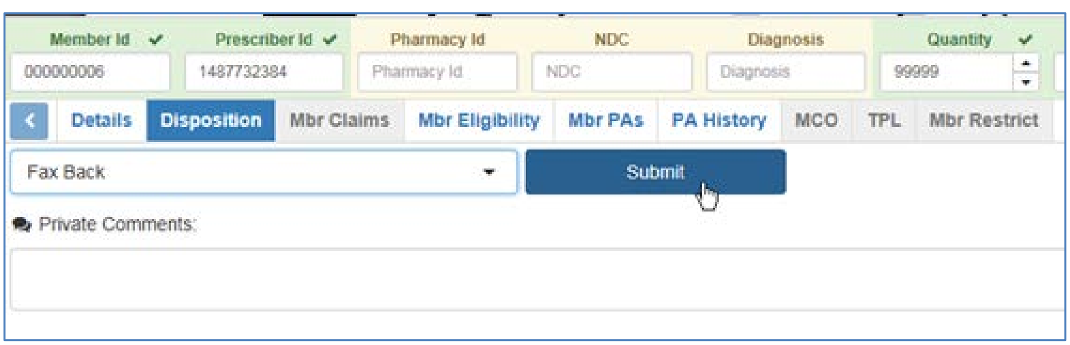
Repeat the process for the next PA in the Key Queue.

Troubleshooting Fax Issues

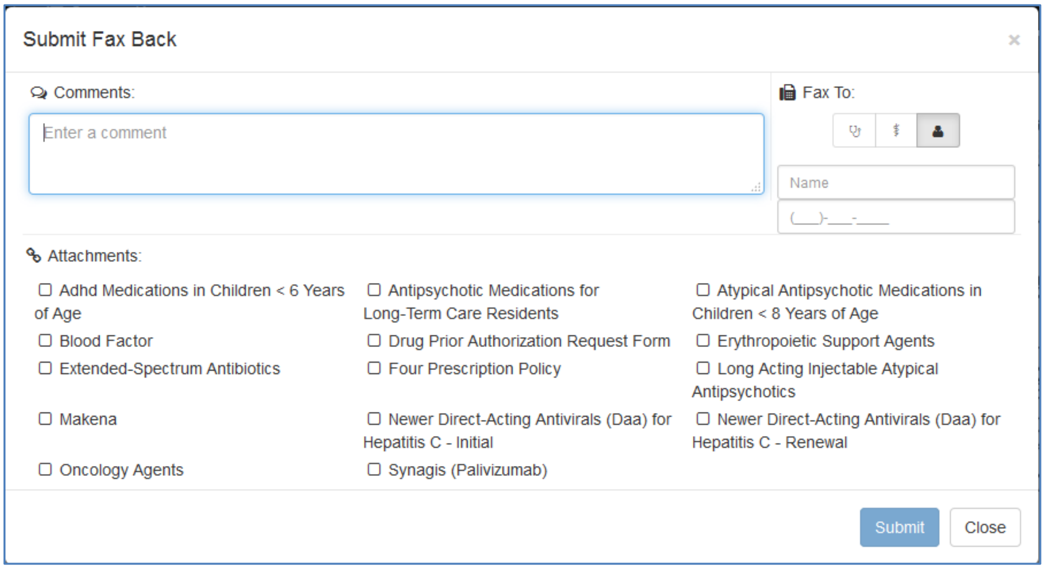
Missing info/unreadable pages– fax # is available

If part of the fax is unreadable or missing critical information, send a fax back to the sender requesting they resend information.

1. Enter as much information as you can from the PA form.
2. You do need to be able to read a fax number off the form, or if you can make out information on the Prescriber or Pharmacy, you can enter their NPI # or search by name.
3. Go to **Disposition** and select **Fax Back** from the dropdown menu. Enter a Private comment indicating what was wrong with the ticket, and then click **Submit**.



A pop up box appears. **Enter a comment indicating the problem with the form.** This comment will appear on the cover sheet of the fax. If the prescriber has been entered and they have a fax # on file, the fax number will automatically fill, or you can enter a different fax #. Click **Submit** to send the fax. This will close the PA request.



Fax To: **Prescriber** **Pharmacy** **Other**

Attachments: You can also fax multiple PA forms with the fax by checking the box next to the form.

Missing info/unreadable pages– fax # is not available

When the fax is unreadable and there is no obvious fax # or contact info:

Close the PA ticket by clicking on **Disposition** and selecting **Admin Close**. You must **enter a comment** indicating the reason for closing the PA ticket, and click **Submit.**

Documenting a Call in Help Desk Call Log

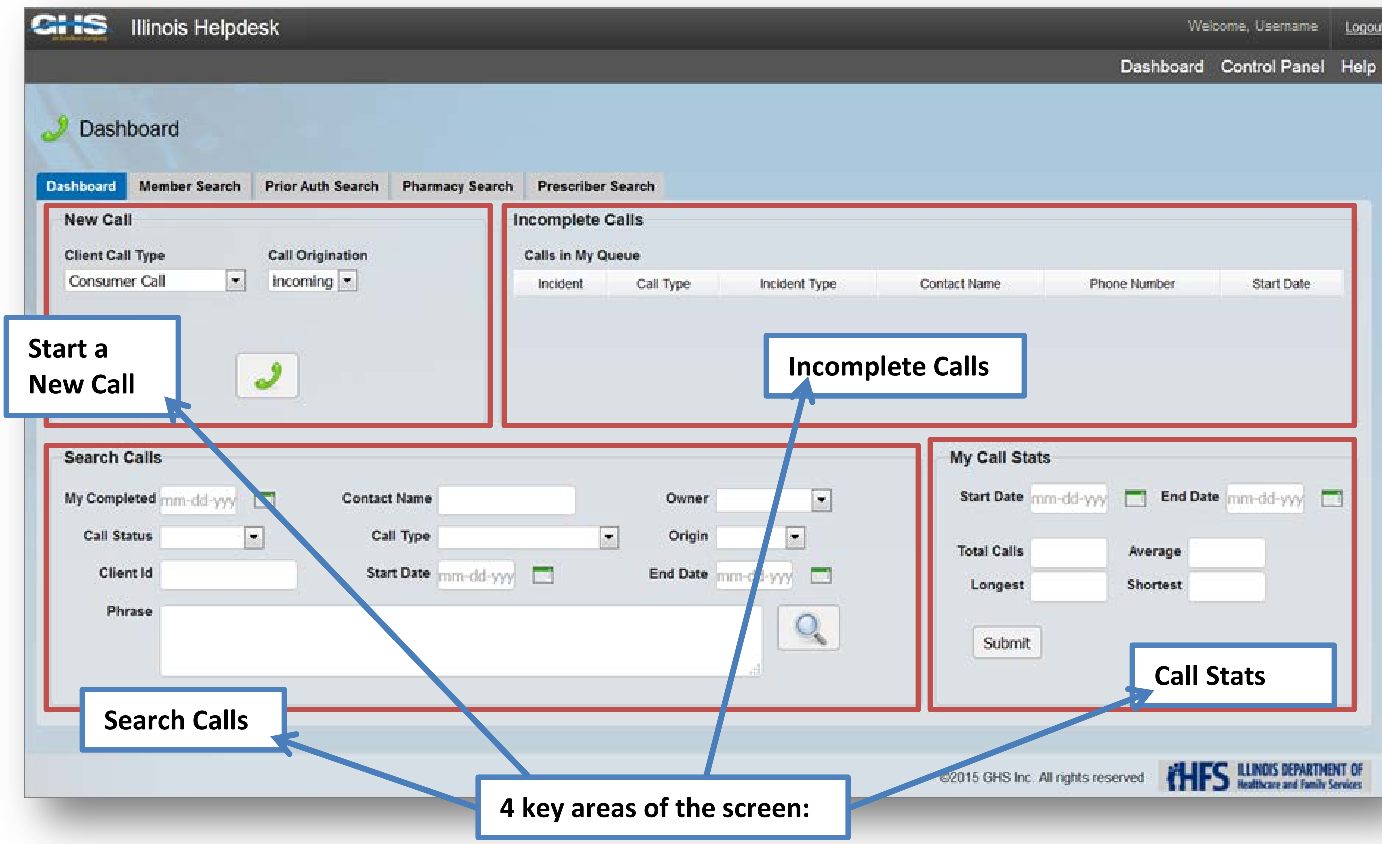
When you need to refer a call to a pharmacist or billing MAC, you can use the Help Desk Call Log (HDCL) to enter a ticket and refer it to a group or individual for follow-up.

There are two main screens in the HDCL:

- **Dashboard**
- **Call Work Space**

Dashboard Screen

This is the main screen you see when the application opens.



4 Key Areas of the Dashboard

Start a New Call – Choose from a dropdown list of call types and indicate if it is an incoming or outgoing call. Click the green phone button to go to the Call Workspace screen where you can enter details about the call. The Contact Information area on the Call Workspace screen will change based on the call type chosen.

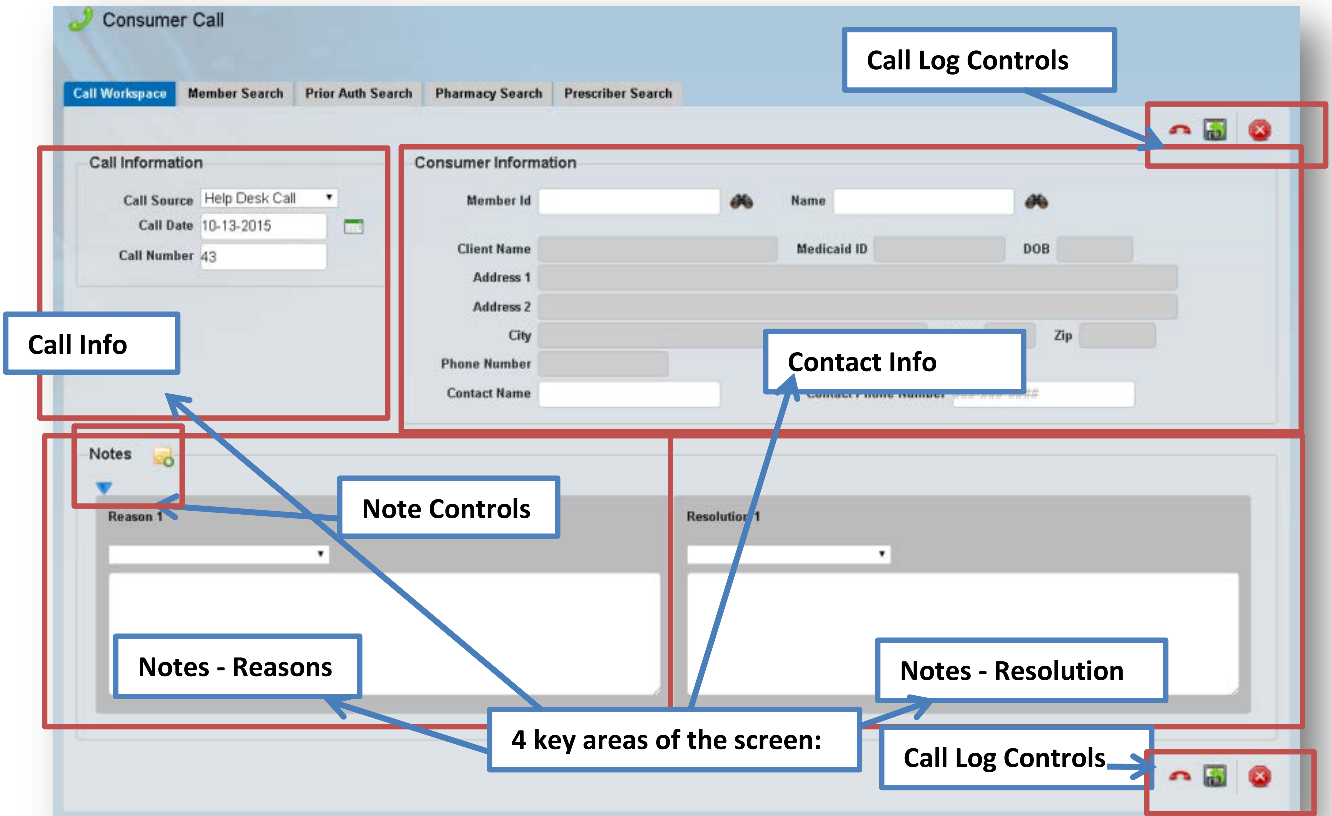
Incomplete Calls – A list of calls assigned to you that are still open. When you forward a call to another person, that call will appear in this section of their screen. (You can click on a call in the list to go to the Call Workspace screen.)

Search Calls – Search for calls based on the fields in this section including dates, call status, type, origin, participant ID, or particular words in the notes of the call.

Call Stats – (Not used) Shows details on call length, number of calls, etc.

Call Workspace Screen

This is the screen where you enter the details about a call.



Call Log Controls- use these during a call to:

Finish the call and save

Save call and close – Shows in incomplete calls section of Dashboard

Abandon call – Delete the call record

Note Controls- Add additional notes, hide or expand notes

Add another note – Creates an additional block of Reason and Resolution. Use when you have multiple issues on a call.

Expand/ Hide Notes – when you have multiple notes, you can hide each note or display it in the notes section.

4 Key Areas of the Dashboard

Call Info – Shows source of call, the date and the auto-assigned number for this call.

Contact Info – Basic contact info on the caller. This area of the screen is based on the call type entered at the start of the call. The contact info is tailored to the person you're talking with- a participant, pharmacy, prescriber or other caller. A special contact area appears if you said it was a PA call.

Notes–Reasons – Record information about the reason for the call. Choose a reason from the dropdown list, and then use the free-form text area to record your notes. (Dropdown list differs based on call type selected)

Notes–Resolution – Enter how you assisted the person. Choose a resolution from the dropdown list then use the free-form text area to record your notes. (Dropdown list differs based on call type selected)

Entering a Call Log

Start a new call log

1. On the dashboard screen, New Call area, click the dropdown list for **Call Type**.
2. From the dropdown list for Call Origination, choose **Incoming or Outgoing**.
3. **Press the green phone button** to start a new call session and go to the Call Workspace screen.

Filling out the Call Workspace screen on a call

4. Under Call Information, select the **source of the call** from the dropdown list.
5. Enter the ID number or **search for the caller**. You can do a search by Name, ID #, or NPI depending on whether it's an individual, pharmacy or prescriber.

Complete the Notes section of the call log

6. Select a **reason** from the dropdown list and then type your notes in the free-form area.
7. Select a **resolution** from the dropdown list and type your notes in the free-form area.
   - **To forward the call a specific group**, select **Referred to (group name)** in the dropdown list.
   - **To forward the call to a specific person**, select **Refer To**, and then select that person from a second dropdown list.
8. **Add additional notes** as needed by pressing the icon next to the Notes heading on the screen. Add additional notes when you have multiple questions on a call.

End the call

 Save the log without closing the call. (This keeps it active in your incomplete calls until you save the call)

 Save the call and close the log. (Choose this when referring a message to someone else)

 Discard the call record without saving.