

# Toniq Dispensary Insurance e-Claiming

## Southern Cross COMPLETE USER GUIDE



Program Version 5.14, March 2018

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## INTRODUCTION TO INSURER E-CLAIMING

Insurer e-Claiming is the provision within the Toniq software to automatically send claims to medical insurers for patient charges incurred on prescriptions. The insurer's system validates the claim and pays it directly to the pharmacy where it can.

Patients with the appropriate cover avoid having to fill out paper forms to claim back their pharmacy charges. They get a better service from both their insurer and their pharmacy.

The current implementation is for **Southern Cross** policy holders. Southern Cross has branded this online claiming system as **Easy-Claim**. The claims are encrypted and then sent via the internet; they conform to the security protocols required for transmission of health data.

## REQUIREMENTS

### TECHNICAL REQUIREMENTS

The minimum requirements for Southern Cross e-Claiming to work are:

- The operating system on the Toniq server must be at least **Windows Vista** (or **Windows 7**) or **Windows Server 2008**, or a more recent operating system
- .NET Framework must be installed on the server
- The Toniq server computer must be on broadband internet

### ADMINISTRATIVE REQUIREMENTS

Southern Cross will require the pharmacy to follow some administrative procedures, e.g. completing forms and providing bank account details, to allow the pharmacy to gain access to the Southern Cross Easy-Claim system. The pharmacy must then be registered with Toniq to use the Southern Cross e-claiming functionality; this is at no further charge from Toniq.

## SETUP

### SOUTHERN CROSS IDENTIFIERS

Southern Cross issues the pharmacy with their Security Account details, which include:

- Security user name
- Security password
- Contracted party (vendor) ID
- Provider ID

These details are also provided to Toniq using a secure internet protocol. After receiving the account details, Toniq will register the pharmacy for the e-Claim module and contact the pharmacy to help with setup.

### TONIQ INSURER E-CLAIMING INSTALLATION

This manual lays out the following steps which should be undertaken for e-Claiming to be installed:

- **.NET Framework** – required for online communication with Southern Cross
- **Toniq Registration** – register the pharmacy for Southern Cross e-Claiming in Toniq
- **Start the Southern Cross Claiming Service**
- **Southern Cross Insurer Setup** – configure the **Private insurance setup** screen
- **Select Insurer for the Store**
- **Add a Southern Cross Member and Validate their Card** – Do a test account card lookup

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### .NET FRAMEWORK

**.NET Framework** is the name of the communication software that needs to be installed on the Toniq server so that prescription claims to Southern Cross can be completed online.

Usually Microsoft .NET Framework will already have been installed; it can be found listed under *Programs and Features* in the *Control Panel* on the PC.

*If .NET is not on the Toniq server, it can be installed following the steps outlined in the **Appendix**. Please ring Toniq for help.*

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## TONIQ REGISTRATION

From the **Main Menu** of any Tonia Dispensary workstation:

- Go to **7. Administration | 4. Registration**
- Press **F4 Check I/Net**
- Scroll down the **Options** to find Southern Cross near the bottom of the list:
  - If this does **NOT** now show **Yes**, call Tonia
- Press **F12 Accept**

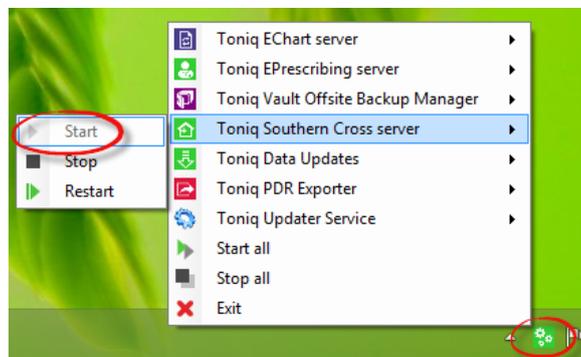
SellChecker	Yes
SouthernCross	Yes
StockPoints	Yes
Vouchers	Yes

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## START THE SOUTHERN CROSS CLAIMING SERVICE

On the **Server** computer:

- Click the Tonia Service Controller:  on the task bar (generally at the bottom right of the screen)
- Select **Tonia Southern Cross server** and press **Start**



**Hint:** From the **Main Menu** press **F10 About**. If what it records as **Server: [Name]** matches **This computer: [Name]** then it is the server.

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## SOUTHERN CROSS INSURER SETUP

From the **Main Menu** of Tonia Dispensary:

- Go to **7. Administration | 7. Exports setup | 2. Private insurance setup**
- Press **F3 Add** and type Southern Cross in the Insurer name field

Set up the rest of the Insurer screen using the notes and screenshot (over-page) as a guide:

- Carefully copy and paste the credentials provided by Southern Cross into the fields indicated by **1**, **2**, **4**, and **5** in the screenshot. They must be present and correct in order for claiming to Southern Cross to function. Contact Southern Cross if you do not have the necessary information
- **3** Press **spacebar** to select the Insurance type; it must be set to Southern Cross.
- Item **6** is the internet address of the Southern Cross server. This should be exactly as it appears in the screenshot: <https://ws.southerncross.co.nz/Claiming>
- **7** Press **F10 Other**, then **T** to **Test connection**. If this fails, contact Tonia (03 341 0195)
- **8** Press **A** to **Authenticate** connection. If this fails, the security details are unrecognised; re-enter your password, ensuring the caps-lock is off, and re-authenticate. If this fails, contact Southern Cross

						Other	Accept Details
						F10	F12
Insurer name	Southern Cross					AFTER setting up that are to claim the insurer. To setup, on the Ex	
Address						<b>Select option</b> 7 Test connection 8 Authenticate connection Delete	
Address							
Address							
Post code							
Voice Phone				Fax Phone			
Contact Name					Receipt message	Always print receipt <input checked="" type="checkbox"/>	
E-mail Address							
Pharmacy name							
1 Security user name	Type the Username supplied by Southern Cross						
2 Security password	Type the Password supplied by Southern Cross					Claim cutoff (days)	5
3 Insurance type	Southern Cross Press the Spacebar to select Insurance type						
4 Contracted party ID	Type the Contracted party (Vendor) ID supplied by Southern Cross						
5 Provider ID	Type the Provider ID supplied by Southern Cross						
Local server						Leave blank for Toniq server.	
6 Insurer URL	https://ws.southerncross.co.nz/Claiming						

#### OTHER RELEVANT INSURER PARAMETERS:

- **Always print receipt option is set by default:** This ensures that an A5 receipt is printed, even if the patient price is zero. The receipt has information on it about the Southern Cross processing of the claim, including Southern Cross e-Claim number reference. It is wise to print these so that the patient can contact Southern Cross to discuss any prescription payment issues
- **Claim cutoff (days)** edits and deletions of scripts older than this will not reclaim to Southern Cross
- **Receipt message** is a pharmacy composed message to print on A5 receipts for Southern Cross members only. This prints above the Southern Cross feedback message

*Remember to press **F12 Accept Details** when the setup is complete.*

#### SELECT INSURER FOR THE STORE

From the **Main Menu** in Toniq Dispensary:

- Go to **7. Administration | 1. Setup | 8. Pharmacy setup | 2. Store setup**
- Press **spacebar** and choose your **Store** from the drop-down list\*
- At the bottom of the screen select the **Insurer** (as entered in **Southern Cross Insurer Setup** described previously) by pressing **spacebar**\*
- Press **F12 Accept Details**

*\* If your pharmacy shares a database with another site, there may be more than one **Store** and **Insurer** available; be careful to select the correct ones.*

**Note:** separate Security Account details are required from Southern Cross for each **Store**.

## ADD A SOUTHERN CROSS MEMBER AND VALIDATE THEIR CARD

Southern Cross will not know that the pharmacy is all set up and ready to go until their system detects a **Southern Cross member card validation** coming from that pharmacy.

Do the following AFTER the **Test connection** and **Authentication connection** checks are successful (as detailed in the previous section **Southern Cross Insurer Setup**) AND the **Insurer** has been selected (as described in **Select Insurer** above).

- With the details given below, add a new patient to your system as a test Southern Cross policy holding patient:

**NAME: Anthony McPhail**

**INSURANCE ID: 6101 1117 6939 7712**

- Now use **F10 Other** and **7 Validate this members policy details**

Goto Notes	NHI/PSC Lookup	Swipe CSC Card	Scan Ins Card	Goto Cards	Lookup Address	Goto DOB	Family	Other	Next Page	Accept Details
F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

**General Details**

Surname: McPhail  
Title:   
First names: Anthony  
NHI:   
Address:   
Address:   
E-mail address:   
Post code:  Phone:   
Mobile:  Fax:   
Ethnicity: Not specified  
Note: Test patient for Southern Cross

**Select option**

- 1 Audit log
- 2 Merge
- 3 Update contact details to Retail
- 4 Print patient details label
- 5 Print patient mailing label
- 6 Lookup insurance card number from another policy member's card
- 7 Validate this members policy details

Usual doctor:   
Weight kg:  Date: / / Hide weight   
Deceased   
NS safety cap  Ins. status: Not insured  
Insurance ID: 6101 1117 6939 7712  
Insurance: Remember 'Don't claim' meds

Anthony is a Southern Cross test patient; the validation should return an address and date of birth (12/01/71). The Southern Cross system registers the validation and records that setup has been completed successfully.

## PROCESSING PRESCRIPTIONS FOR SOUTHERN CROSS POLICY HOLDERS

### ADDING A SOUTHERN CROSS INSURANCE ID

Each Southern Cross policy holder is issued a member's card with a unique card number unless they are younger than 16 years old. (Children will still be assigned a unique Insurance ID number.) The card has a 16-digit number on the back, a magnetic strip, and a bar code.

To identify the patient in the Dispensary program as being a Southern Cross member:

- Select patient and **F2 Edit patient** from Prescription Entry screen
- Enter the insurance card number by *either*:
  - Press **F5 Scan Ins Card** to swipe the magnetic strip or scan the barcode on the insurance card with pharmacy peripherals, *or*:
  - Manually type in the 16-digit number into the **Insurance ID** field (the first 6 digits will be pre-populated)
- Then validate it by going **F10 Other**, **7 Validate this members policy details**

Toniq will connect to Southern Cross and get the member details for the card entered. These are displayed on the screen (as shown over-leaf):

Goto Notes	NHI/PSC Lookup	Swipe CSC Card	Scan Ins Card	Goto Cards	Lookup Address	Goto DOB	Family	Other	Next Page	Accept Details
F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

**General Details**

Surname: McPhail  
 Title: \_\_\_\_\_  
 First names: Anthony  
 Address: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 E-mail address: \_\_\_\_\_  
 Post code: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Date of birth: / / Mobile: \_\_\_\_\_  
 NHI: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Ethnicity: Not specified  
 Note: \_\_\_\_\_

**Select option**

- 1 Audit log
- 2 Merge
- 3 Update contact details to Retail
- 4 Print patient details label
- 5 Print patient mailing label
- 6 Lookup insurance card number from another policy member's card
- 7 Validate this members policy details

Use the F10 Other - Validate this members policy details option to connect to Southern Cross and check that the card matches both the patient's name and date of birth

Usual doctor: \_\_\_\_\_  
 Weight kg: \_\_\_\_\_ Date: / /  
 Deceased   
 NS safety cap  Ins. status: Insured  
 Insurance ID: 6101 1117 9639 7712  
 Insurance: Remember 'Don't claim' meds

**Card Details**

'4'  Reduced cost PHO Number: \_\_\_\_\_ Expiry: / /  
 CS  - - -  
 HU/C+  / /  
 Exempt  External

6101111769397712  
 Anthony McPhail  
 30 Henderson, Henderson, 0782  
 Read ?

If the card number is being added to an existing patient it is VERY IMPORTANT to CHECK THE CARD DETAILS returned by Southern Cross match those held on the pharmacy patient record, especially the date of birth.

If there is any doubt, (for example, date of birth missing from pharmacy record) double check details with the patient. It may be necessary to repeat the search of the pharmacy data.

If the connection to Southern Cross fails for some reason, make a note of the error message and contact Toniq.

*Whenever a new Insurance ID is added – always **Validate** the member's policy details.*

### SETTING AN INSURANCE ID USING ANOTHER POLICY HOLDER'S CARD

Where an insurance policy covers more than one patient, e.g. members of a family, it is possible to look up and set a patient insurance ID using another patient's member card.

**Example:** A mother is picking up medicine for her son, but he does not have a card because he is younger than 16. The pharmacist can use the mother's card and the **F10 Other** option to **6 Lookup insurance card number from another policy member's card** to find and set her son's Insurance ID.

Goto Notes	NHI/PSC Lookup	Swipe CSC Card	Scan Ins Card	Goto Cards	Lookup Address	Goto DOB	Family	Other	Next Page	Accept Details
F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

**General Details**

Surname: McPhail  
 Title: \_\_\_\_\_  
 First names: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 E-mail address: \_\_\_\_\_  
 Post code: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Date of birth: / / Mobile: \_\_\_\_\_  
 NHI: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Ethnicity: Not specified  
 Note: Southern Cross test patient

**Select option**

- 1 Audit log
- 2 Merge
- 3 Update contact details to Retail
- 4 Print patient details label
- 5 Print patient mailing label
- 6 Lookup insurance card number from another policy member's card
- 7 Validate this members policy details

Use the F10 Other - Lookup... option to connect to Southern Cross and lookup the card holder's details to find other policy members' Insurance IDs

Enter the card holder's ID number in the window the Lookup... option opens

Enter last 10 digits of any family member's Southern Cross card number.  
 6101 11 \_\_\_\_\_

Usual doctor: \_\_\_\_\_  
 Weight kg: \_\_\_\_\_ Date: / /  
 Deceased   
 status: Unknown  
 Insurance: Remember 'Don't claim' meds

If the lookup finds the required patient, press F12 to transfer the number to the patient record Insurance ID

Card number	DOB	Name	Address
610111	30/08/68	Anna	30 Henderson, Henderson, 0...
610111	30/11/09	Meredith	30 Henderson, Henderson, 0...
610111	29/11/06	Adam	30 Henderson, Henderson, 0...
610111	05/03/05	Claudia	30 Henderson, Henderson, 0...

*If the two policy holders concerned are adults, there may be privacy concerns. Check pharmacy protocols before doing the lookup.*

## INSURANCE STATUS

A patient with no Insurance ID will default to an Insurance status of **Unknown**. When the patient record has an insurance member ID loaded and validated, it will change to **Insured**, **Suspended**, **Terminated**, or **Invalid card number** automatically – depending on the status of this card number in the Southern Cross system.

**ONLY PATIENTS WITH AN INSURED STATUS HAVE THEIR RXS CLAIMED TO SOUTHERN CROSS.** If an error was made entering the Insurance ID, the corrected number should be re-validated to re-set status to **Insured**.

The screenshot shows a form titled 'Extra Details' with various fields. A dropdown menu is open, showing the following options: 1 Not insured, 2 Insured, 3 Suspended, 4 Terminated, 5 Unknown, and 6 Invalid card number. The 'Ins. status' field below the dropdown is set to 'Unknown' and is circled in red. The 'Insurance ID' field contains the number '6101 1117 6939 7712'. There are also checkboxes for 'Deceased', 'NS safety cap', and 'Insurance: Remember 'Don't claim' meds'.

If the policy of a previously insured patient lapses, the next time scripts are entered, and Southern Cross e-Claiming is attempted, feedback will change the insurance status on the patient record.

## IDENTIFICATION OF INSURED PATIENTS

Selection of a patient in the prescription entry screen immediately reveals if they have had a **valid** Insurance ID loaded, since the ID is displayed on the screen under other patient specific data.

The screenshot shows a prescription entry screen with a grid of tabs at the top: Edit Patient (F2), LTC/ Services (F3), Ph/Fax Refer (F4), Use History (F5), Dose Pack (F6), Supply Option (F7), Use Log (F8), Bag Option (F9), Other (F10), and End Visit (F11). The 'Ph/Fax Refer' tab is active. The patient name is 'Anthony McPhail'. The 'Rx code' is 'A4?'. The 'Default contract' section shows 'NHI .....' and 'Southern Cross 610111796397712' circled in red. Below this, it says 'Southern Cross test patient'.

This is a useful visual clue for pharmacists, particularly if a patient is telling them they are Southern Cross insured and the number is NOT showing on screen.

If the patient information does show Southern Cross, but not the Insurance ID then at some point that ID or the policy it represents has been invalidated, e. g. **Southern Cross Invalid card number**, **Southern Cross Suspended**, etc.

## PROCESSING PRESCRIPTIONS

*The Southern Cross claiming functionality is only implemented for prescriptions processed through the Prescription entry screen.*

## PRESCRIPTION CYCLES AND GROUPED REPEATS

Prescriptions and/or repeats processed using either of these functions will NOT CLAIM to Southern Cross.

The important point here is to remember to check, when adding a patient's dosepack to a cycle, whether the patient is a Southern Cross member.

## INSTITUTION PATIENTS PROCESSED IN THE RX ENTRY SCREEN

If a patient is in an institution but has their prescriptions processed in the prescription entry screen, whether *in* or *out* of **Dosepack mode**, the program WILL submit claims to Southern Cross.

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## PROCESSING RXS IN THE RX ENTRY SCREEN

When a patient who is set up with a valid Southern Cross card ID is selected in the Rx Entry screen, the system automatically forces two system options:

1. The labels for this patient's prescription items will be printed at **End Visit**
2. An A5 receipt will always be printed at **End Visit**. Southern Cross Insurer e-Claim reference numbers and feedback are printed on the receipt (see examples in **Receipt Messages**). This is information the patient may require if they need to follow up any claim with Southern Cross

Toniq connects to the Southern Cross system, sends the data that they require to validate the items on the prescription, and pay them according to the patient's policy when one of three things happen; *either*:

- **F11 End Visit** key is pressed, *or*:
- the next patient is selected, *or*:
- the user escapes from the prescription entry screen

If a Southern Cross answerback is received, the script is repriced according to the insurer feedback, then the labels and receipt are printed.

<b>*Subsidy</b>	<b>Ins.</b>
Subsidy	<b>3.97</b>
Ins.	<b>7.00</b>
Co-pay	<b>5.00</b>
PP,extra	<b>2.00</b>
Price	<b>0.00</b>

The pricing box on screen now shows an Insurance row, **Ins.**, which shows what has been paid by Southern Cross.

If Southern Cross answerback indicates that the patient's card is now no longer current, the reason given in the Southern Cross response will be displayed on screen, and the patient record Insurer status will *automatically* change from being insured to the appropriate non-insured status.

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## PRESCRIPTION EDITS

If an e-Claimed prescription is subsequently edited, such that the PRICE paid by patient *or* Southern Cross CHANGES, it is claimed to Southern Cross again as a reversal and re-claim.

## SOUTHERN CROSS PAYMENTS

### PATIENT RECEIPTS

For any Southern Cross patient, the Dispensary program will force the print of a receipt with two columns: paid by insurance, **Ins.**, and **Patient Price**. The system option for printing receipts to labels is not available for Southern Cross members because an explanatory message and the Southern Cross e-Claim number need to be printed. The A5 receipt is printed at **End Visit**.

**Example:** The receipt below shows that Southern Cross has paid the \$15.00 payment on the Amitriptyline and Paracetamol Rxs but not the \$5.00 co-pay on the Amoxicillin Rx.

	Ins.	Patient Price
Dr Scott		
13Jun13 961202/1 Amitriptyline HCl10mg Tablets	\$15.00	\$0.00
13Jun13 961209/0 Paracetamol500mg Tablets	\$15.00	\$0.00
Dr Family Health		
13Jun13 975187/0 Amoxicillin trihydrate500mg Capsul	\$0.00	\$5.00
		<b>\$5.00</b>

The insurance column *only* appears on receipts for Southern Cross members; it shows what Southern Cross has paid in response to the online claim.

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## NON-PAYMENT BY SOUTHERN CROSS

If the Southern Cross column shows that only some of the patient charges have been paid leaving the patient to pay the rest, the reason could be one or more of the following:

- The patient policy does not cover 100% of the prescription charges
- The specific medicine is excluded in the policy (e.g. oral contraceptives)
- The policy has a cap and the patient has just reached it
- One or more of the medicines in the claim are expensive medicines which require special clearance by Southern Cross personnel before they can be paid online

Whatever the cause may be, Southern Cross prefers pharmacy staff to avoid any attempt to explain why payments have not been paid. The patient should be REFERRED TO THE SOUTHERN CROSS HELPDESK for explanation.

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## RECEIPT MESSAGES

Various messages may be returned by Southern Cross depending on the policy and what has, or has not, been paid. All claims to Southern Cross will generate a message quoting a claim reference number.

Your Southern Cross Health Society e-claim number is e88676. Your claim has been paid directly to the pharmacy in accordance with the terms of your Southern Cross Member card and policy.

Receipt includes items from 2 e-claims: e69380, e69381

Sorry, a technical issue means we are unable to process your e-claim at this time. Please fill out a paper claim form and send to by post.

*These messages come direct from the Southern Cross system and are relayed to the customer receipt via the Toniq program. If Southern Cross chooses to adjust the content or format of any part of this message, Toniq may not be informed, and the messages may not match those in this manual.*

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## RECEIPT REPRINTS

In the example below, the reprint includes two Rxs done in different visits; both were claimed to and paid by Southern Cross.

	Ins.	Patient Price
Dr Jonathan 15May13 958370/0 Amitriptyline HCl10mg Tablets	\$0.00	\$15.00
Dr Scott 13Jun13 961202/1 Amitriptyline HCl10mg Tablets	\$15.00	\$0.00
Dr Antony 10Oct13 973565/0 Amitriptyline HCl10mg Tablets	\$15.00	\$0.00
<b>Southern Cross Claim Message</b>		<b>\$15.00</b>

Receipt includes items from 2 e-claims: e69380, e88676  
Some items may not have been sent to due to a technical issue. Please fill out a paper claim form and send to by post.

The Insurance reference numbers for all items on the receipt are printed. This receipt also shows an Insurer specific message that pharmacy can compose themselves. In this example the message is simply *Southern Cross Claim Message* (highlighted). To set up this Insurer specific receipt message go to: **7. Administration | 7. Exports setup | 2. Private insurance setup** and type the desired text under **Receipt message** on the right-hand side.

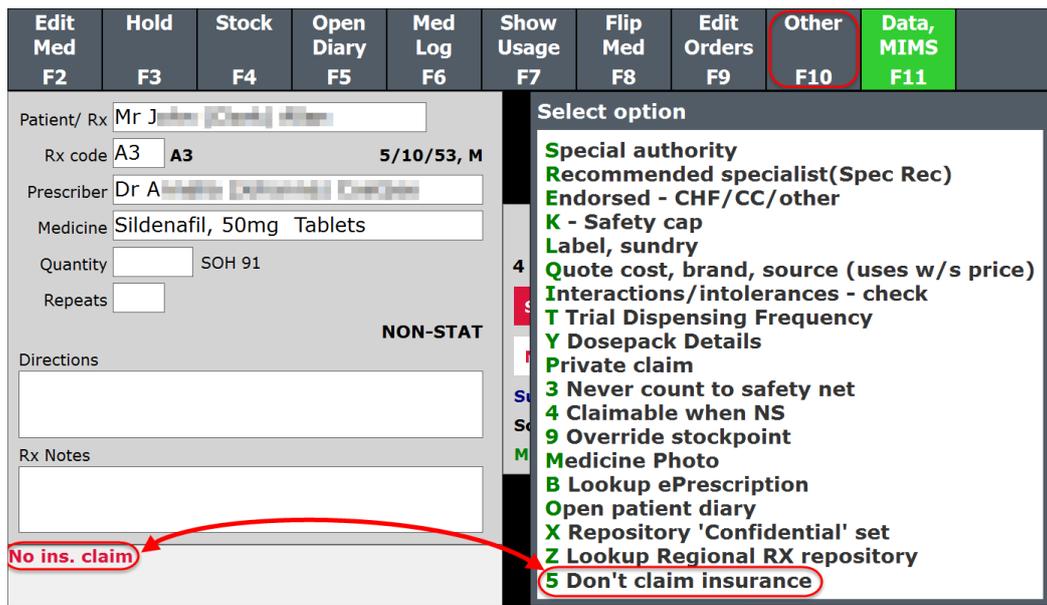
**Note:** Since the example above is a REPRINT of a receipt, no LIVE message generated by Southern Cross is included on the receipt, just a reference to the saved e-Claim numbers.

**PAYMENTS FROM SOUTHERN CROSS**

We understand that Southern Cross makes overnight payments directly to the bank account that was supplied by the pharmacy at the start of Easy-Claiming.

**PREVENTING A MEDICINE FROM BEING CLAIMED ONCE**

If the patient does not wish a prescription for a particular medicine to be e-Claimed to Southern Cross, the Dispensary program allows for it to be marked as being a non-insurance medicine for that patient. To do this, select the medicine, press **F10 Other**, then **5 Don't claim insurance**. This marks the prescription with **No ins. claim** displayed on screen under the **Rx Notes** (see example below).

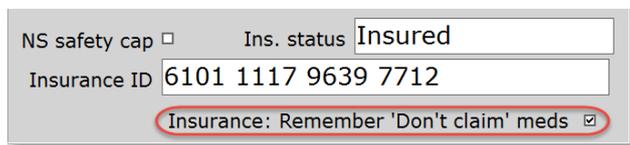


*This only prevents this specific prescription from being e-Claimed.*

Pressing **F10 Other**, **5 Claim insurance** a second time will undo the action and remove the flag if it has been put on in error.

**PREVENTING A MEDICINE FROM BEING CLAIMED PERMANENTLY FOR A PATIENT**

The patient record can be set to remember any such **Don't claim insurance** scripts. To do this, before entering the Rx, edit the patient record and set the flag: **Insurance: Remember 'Don't claim' meds**:



This means that all future prescriptions processed for that medicine will automatically bring forward the **No ins. claim** status; i.e. so that this Rx, and all subsequent dispensings of this medicine, will not be claimed to Southern Cross for this patient.

*To never claim a particular medicine, set **No ins. claim** once (as above) AND have **Insurance: Remember 'Don't claim' meds** ticked*

## REPORTING

### INSURANCE CLAIMS REPORT

To report on Southern Cross processed prescriptions, from the [Main Menu](#) go to:

#### 3. Reports | 8. Audit Reports | 2. Insurance claims

This report will give the insurance history for prescriptions across a date range. Reports can be filtered by such variables as *patient*, *medicine*, and/or *e-Claim number*. Prescription details can optionally be shown on the report. Grand totals for claims, and what has been paid, are shown at the bottom of the report.

- The report highlights that a patient who is covered for medicine costs, may not be covered for all types of medicines. Patient 1 (in the following example) has not had her oral contraceptive paid, and Patient 2 has not had the Tramal prescription paid.
- The example report shows what was probably a 'queued' transmission for Rx number 854235/1, for patient 3, for omeprazole.
- The report also shows what happens when a paid prescription is edited. Patient 3's Rx for omeprazole was not paid the \$3.00 co-pay (eClaim# 1101). However, the Rx was then changed to an A3 code, so this generated two more transmissions to Southern Cross, one to reverse out any paid transaction, and a second to create a **NEW CLAIM** on a **NEW NUMBER** for the \$15.00.

Insurance claims report									
Period: 09/04/10 00:00 to 09/04/10 17:00									
Insurer: Southern Cross									
Show script details									
Date/Time	EClaim#	Staff	Type	Patient	Card#	Claim	Paid	Var	
09/04/10 09:46	1074		Submit	Patient name 1	1113044535710	24.35	3.00	21.35	
	#1 854210/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Grant Bellan	3.00	3.00	0.00	
	#2 854211/0 O4			MERCILON 21 Tablets	Dr Grant Bellaney	21.35	0.00	21.35	
09/04/10 11:56	1088		Submit	Patient name 2	1110912940519	71.05	32.55	38.50	
	#1 854224/1 A4			LIPITOR 10mg Tablets	Dr Michael John Burt	29.55	29.55	0.00	
	#2 854225/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Michael John	3.00	3.00	0.00	
	#3 854226/1 A4			TRAMAL 50mg Capsules	Dr Michael John Burt	38.50	0.00	38.50	
09/04/10 13:52	1100		Submit	Patient name 3	1113044535711	6.00	3.00	3.00	
	#1 854235/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Grant Bellan	3.00	0.00	3.00	
	#2 854236/1 A4			Erythromycin e.s. 400mg Tablets	Dr Grant Bellaney	3.00	3.00	0.00	
09/04/10 13:58	1101		Submit	Patient name 3	1113044535711	3.00	0.00	3.00	
	#1 854235/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Grant Bellan	3.00	0.00	3.00	
09/04/10 13:59	1101		Reverse	Patient name 3	1113044535711	0.00	0.00	0.00	
	#1 854235/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Grant Bellan	0.00	0.00	0.00	
09/04/10 13:59	1102		Resubmit	Patient name 3	1113044535711	15.00	15.00	0.00	
	#1 854235/1 A4			OMEPRAZOLE DR REDDY'S 10mg Capsules	Dr Grant Bellan	15.00	15.00	0.00	

### DISPENSARY SUMMARY REPORT

This report, found at [3. Reports | 1. Business Analysis Reports | 1. Dispensary Summary](#), will automatically tally up Southern Cross claims and put a new section at the bottom of the report.

This report indicates how many items have been claimed, and how many have been paid, with values.

INSURANCE		
Paid	182	\$876.17
Processing	66	\$527.99
Total claimed	248	\$1460.19
Unclaimed	0	\$0.00

## APPENDIX

### .NET FRAMEWORK INSTALLATION

- The .NET installation **MUST** be done on the Toniq server
- It **MAY** require a restart of the server\* and
- The installation **MAY** take up to half an hour

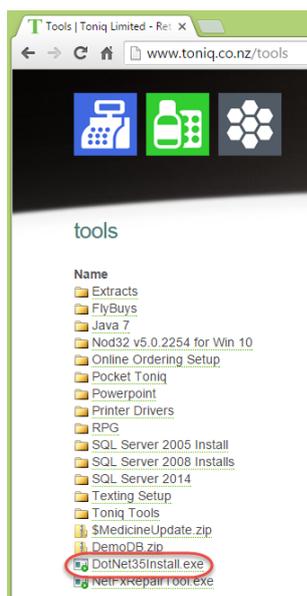
The *mays* are dependent on which operating system is used and whether the computer is completely up to date with its Windows updates.

\* **Note:** If the installation does require a restart, an option is given to cancel out of the installation process at that point. The installation can then be resumed at a more convenient time after the restart has been done. The installation knows what it has already done and will merely continue from the re-start point.

**Hint:** From the **Main Menu** press **F10 About**. If what it records as **Server: [Name]** matches **This computer: [Name]** then it is the server.

Toniq's advice is to run the installation after-hours, when all Toniq programs are closed, **BUT** if you want to run it during working hours, you can do so, provided you appreciate the information above.

### TO RUN THE INSTALLATION



- Open a browser on the server and go to [www.toniq.co.nz/tools](http://www.toniq.co.nz/tools)
- Double click on **DotNet35Install.exe**
- Click **Run** at the prompt: *Do you want to run or save this file?*
- Click **Run** if you get a security message: *Do you want to run this software?*
- Click **Next** when asked if you would like to continue

Various screens will now appear with progress bars while the components of the .NET Framework are installed. Some of these may stay on screen for quite a while despite saying they are 100% complete and show a full progress bar. **PLEASE BE PATIENT.**

- Click **Finish** at the end of the installation

*If the installation was cancelled due to the restart being inconvenient, please remember to continue the installation process as soon as convenient after the restart.*

## FAQS

- Q.** My **F10 Other** menu does not have the card **Lookup** and **Validate** options. Why is this?
- A.** The *Store* is not setup for Southern Cross Insurance. See **Select Insurer for the Store** in in this manual.
- Q.** Why doesn't my **F10 Other** menu have the **Validate** option?
- A.** The **Validate** option is only present when there is a 16-digit card number in the **Insurance ID**. Is the ID missing? Or is it missing a digit?
- Q.** This patient's card validates but claims have **NEVER** been paid for this patient, and the patient is sure they are covered for pharmaceutical expenses. Why is this?
- A.** Southern Cross payment validation rules for a policy holder focuses primarily on the patient's date of birth. The date of birth held at Southern Cross can be checked using the **F10 Other, Validate** option.
- If the **Date of Birth** in Toniq *matches* that held by Southern Cross, then the reason the policy is not paying is not obvious, the patient should contact Southern Cross.
  - If the **Date of Birth** in Toniq *is absent*, payment is still made even if the first name and/or surname do not match those held at Southern Cross. Be very careful to load cards onto the right patient.
  - If the **Date of Birth** *is different* than the Date of Birth held by Southern Cross, the first name and surname must match exactly for payment to be made.

*Payment will only be made according to the terms of the policy.  
Refer the patient to Southern Cross if details in Toniq are correct.*

- Q.** This patient's card validates, and claims used to pay but have stopped paying now.
- A.** If the patient's card validates, i.e. there is not a technical or obvious policy problem, then it may be that the policy for this patient has a cap, and this has been reached. **THE PATIENT SHOULD CHECK THEIR POLICY OR CONTACT SOUTHERN CROSS FOR HELP.**
- Q.** I've processed two repeats for a patient, for the same patient on the same day. Only the first one has been paid. Why?
- A.** The Southern Cross system regards any claims made for the same patient for the *same medicine*, done on the *same day* as being duplicates, i.e. the second and subsequent claims are ignored. (No validation is done to the prescription number by Southern Cross.)
- Q.** I'm trying to set this patient's prescription to **Don't Claim insurance**, but the option is not present on the **F10 Other menu**.
- A.** Has the patient had their member card loaded? If the Dispensary program does not recognise the patient as a Southern Cross Member, it will not give you the option **Don't Claim insurance**.