NCPDP Online
User Guide

Chain Pharmacies

Table of Contents

Table of Contents *(continued)*

User Guide Update Log

- February 7, 2009 → Change of Relationship/Payment Center *(see 4.2)*

- February 7, 2009 → Change of Ownership *(see 9.0, 9.1, 9.2)*

1.0   Introduction

NCPDP has maintained accurate pharmacy information for over 25 years. It is important that you update all of your pharmacy information with NCPDP. Doing so is vital to proper reimbursement by many third party plans. CMS also uses NCPDP pharmacy information to audit Medicare Part D claims data. With the launch of **NCPDP Online** (www.NCPDPonline.org) it is now easier than ever to maintain your pharmacy data and make any updates/changes to your pharmacy profile.

NCPDP Online gives you more control over your pharmacy data, is completely paperless and still provides all the validation and verification checks to ensure your pharmacy information is accurate. But it is important to note that only YOU can keep your pharmacy information up-to-date.

As in the past, you have the ability to grant NCPDP permission to act as an (EFIO) for your pharmacies. This means that NCPDP will automatically submit changes you make to the NCPDP database to the CMS National Plan and Provider Enumeration System (NPPES). This service has been enhanced for the NCPDP Online web site. Previously, you would simply check off Yes or No to whether or not you wanted NCPDP to act as the EFIO. Now you can specify you want NCPDP to act as the EFIO for ADDS and/or for CHANGES. This enables you to obtain your own NPI numbers (if you prefer) and still have NCPDP act as the EFIO for CHANGES.

Logging in and updating your pharmacy information with NCPDP will ensure accurate and timely reimbursement of claims and it is the simplest way for you to be sure your data is in synch with NPPES.

Data flow through NCPDP Online:
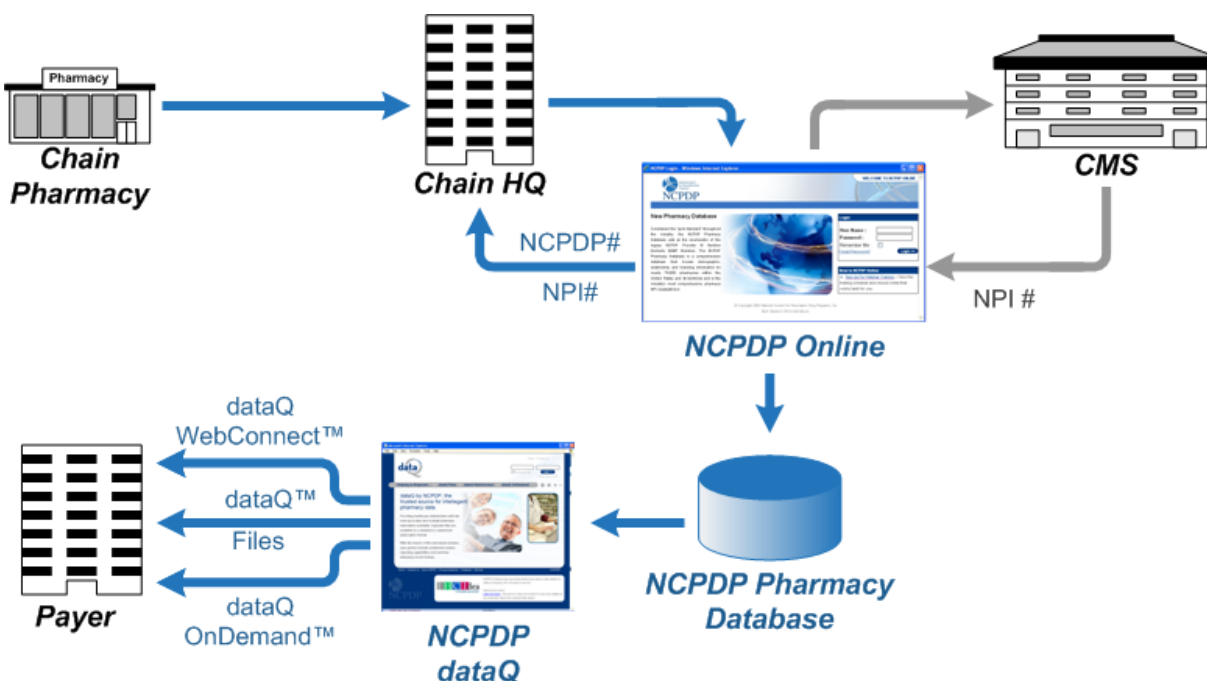
2.0   Log In

As soon as you receive your user name and password you should log in, verify your data is correct and clean up any outdated information. Anytime your pharmacy information changes in the future, you should return to NCPDP online to make updates.

Initially only the Authorized Official for your chain or relationship code will have an account and he/she will be set up as an Administrator. If you are not your company's Authorized Official and you do not have an account on NCPDP Online, you should contact your Authorized Official to get an account.

The NCPDP Online web site works best in Microsoft Windows Explorer 6.0 or higher. If you are not using Microsoft Windows Explorer, you can download the latest version from the Microsoft web site free of charge at www.microsoft.com.
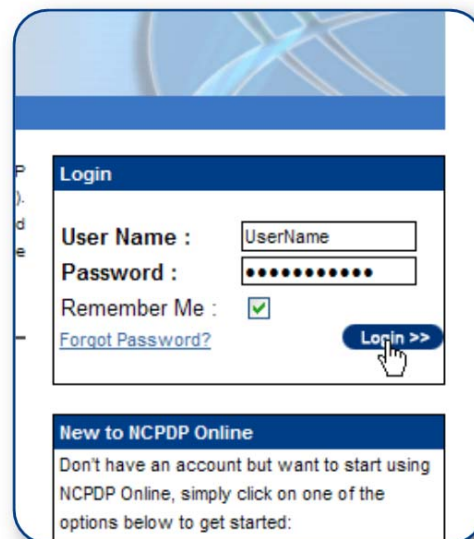
There are parts of NCPDP Online that require your Internet browser to accept pop-ups. You should allow pop-ups for NCPDP Online, which you can do without allowing pop-ups for other web sites. To do this, open your Internet browser and:

1.   Click **Tools** at the top of your Microsoft Internet Explorer browser

2.   Select **Pop-Up Blocker**

3.   Select **Pop-Up Blocker Settings**

4.   Enter **www.ncpdponline.org** in the **Address of Website to Allow** box

5.   Click the **Add** button, then click the **Close** button

To log in to NCPDP Online:

1.   Open your Internet browser and go to
     www.ncpdponline.org

2.   Enter your **User Name** and **Password**, then click
     Login.

If you click the **Remember Me** box, you will automatically be logged in if you are using the same computer the next time you visit the website *(if your Internet Browser is set to allow "cookies")*. When you are finished using NCPDP Online, you should simply close your browser or go to another site, do not "log out".

3.0   Managing Your Preferences

The first thing you should do after logging on to NCPDP Online is update **Your Preferences.** This includes updating your user profile, changing your password and PIN, and setting your alert preferences.

3.1   Change Your Profile

Your profile contains your basic contact information.

1. Click the **My Preferences** tab.

2. Make changes to your **Primary Information**. Your email address, phone number and fax number will be validated for correct format.

3. Click the **Update** link to save your profile.

3.2   Change Your Password

To change your password, you will need your current password.

1. Click the **My Preferences** tab.

2. Click the **Change Password** link in the **Actions** box.

3. Enter your **Current Password**, a **New Password** and re-enter the new password in the **Confirm New Password** box.

4. Click the **Update** link to save your new password.

3.3   Change Your PIN

Along with a user name and password, you are also provided with a PIN. The PIN is an additional level of security on the web site. Your PIN will be required when submitting a new NCPDP Provider ID application or updating key information in an existing NCPDP Provider ID pharmacy profile.

Updates to the following fields within an existing NCPDP Provider ID pharmacy profile will require a PIN for authentication:

*   Pharmacy DBA Name
*   Pharmacy Legal Name
*   Store Open / Close Date

- Physical Address
- NPI Number and Confirmation Document
- Federal Tax ID and Documentation
- State Tax ID
- Class Designation
- Taxonomy Code(s)
- Authorized Official
- Relationships and Payment Centers
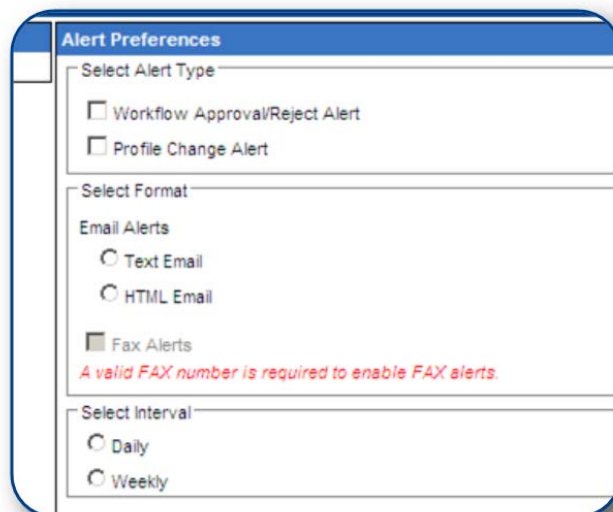
To change your PIN, you will need your current PIN.

1. Click the **My Preferences** tab.

2. Click the **Change PIN** link in the **Actions** box.

3. Enter your **Current PIN**, a **New PIN** and re-enter the new PIN in the **Confirm New PIN** box.

4. Click the **Update** link to save your new PIN.

3.4   Change Your Alert Preferences

Your Alert Preferences define how you want NCPDP Online to alert you when changes are made to your pharmacies.

1. Click the **My Preferences** tab.

2. Click the **Alert Preferences** link in the **Actions** box.

3. Select one or more types of alerts from the **Select Alert Type** list.

4. Click one or more alert formats from the **Select Format** list. If you select **Fax Alerts**, enter your preferred fax number. If you do not enter a preferred fax number, the fax number in your profile (*see 3.1 Change Your Profile)* will be used. *Note: Some email accounts do not allow HTML email; if you experience issues receiving an HTML email alert, change the alert to Text email.*

5. Choose to receive your alerts **Daily** or **Weekly**. If you choose daily, all changes to your pharmacy data will be compiled and one alert will be sent at approximately 2:00am Eastern for the changes made the day before. If you choose weekly, all changes to your pharmacy data will be compiled, over the course of a week, and one alert will be sent at approximately

2:00am Eastern on Thursdays for the changes made the week before. *Note: If there are no changes to your pharmacy data, you will not receive an alert.*

There are some alerts that you will receive in real time. These are time sensitive alerts that require your attention immediately.

6. Click the **Update** link to save your alert preferences.
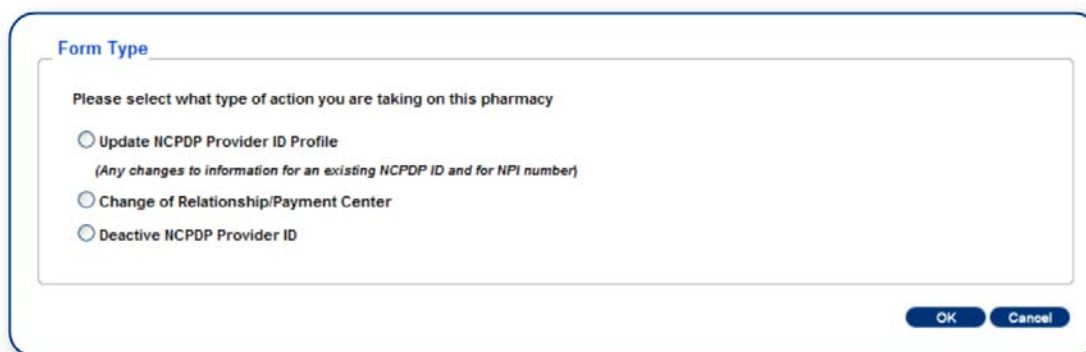
3.5   PIN Recovery

If you have forgotten your PIN, you can request to have it reset and emailed to your e-mail address on record.

1. Click the **My Preferences** tab.

2. Click the **PIN Recovery** link.

3. You will be asked **Do you wish to reset your PIN and send it to your e-mail address on record?** If you click **OK**, your PIN will be reset and emailed to you.

4.0 Update an Existing NCPDP Provider ID Pharmacy Profile

When you update an existing NCPDP Provider ID pharmacy profile, you will have three options:

- Update NCPDP Provider ID Profile
- Change of Relationship/Payment Center
- Deactivate NCPDP Provider ID *(see 6.0 Deactivate an NCPDP Provider ID Profile)*

Form Type

Please select what type of action you are taking on this pharmacy

○ Update NCPDP Provider ID Profile

(Any changes to information for an existing NCPDP ID and for NPI number)

○ Change of Relationship/Payment Center

○ Deactive NCPDP Provider ID

OK   Cancel

4.1 Update an NCPDP Provider ID Profile

To update your NCPDP Provider ID pharmacy profile:

1. Click the **NCPDP Provider ID** tab.

2. All your pharmacies are listed. To search for a pharmacy, enter the NCPDP number and click the **Search** button OR click the **Advanced Search** link, enter search criteria and click the **Search** button. From the search results, click the **Update** link for the pharmacy you wish to update.

3. Choose **Update NCPDP Provider ID Profile** and click the **OK** button.

When you update your NCPDP Provider ID pharmacy profile, it is separated into the following sections: Primary Information, Physical Location, Mailing Address, NPI Information, License Information, Class Designation, Other Services, Hours of Operation, Taxonomy Codes, Authorized Official, Active Relationships. Click the appropriate link in the **NCPDP Provider Profile** box to jump to one of these sections. To return to the top of the profile, click the **back to top** link in each section.

Some parts of your profile will require a document upload. Documents required for your NCPDP Provider ID pharmacy profiles include: State pharmacy license, pharmacy DEA registration, Federal Tax ID documentation and NPI confirmation.

If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Browse** button and selecting the file from your computer.

If you do not have the document electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll free number indicated on the coversheet. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

It is important you use the coversheet generated for the specific document you are sending when you fax. It contains important information for NCPDP to properly match the document with your profile. You may need to generate more than one cover sheet and send more than one fax if you have more than one document to send to NCPDP. Do not batch all documents under one coversheet.

4. If you are updating a pharmacy profile and you are not ready to submit changes to NCPDP, you can save your changes by clicking the **Pend Changes** link in the **Actions** box and/or at the bottom of the profile page. You can access your pended changes by going to the **NCPDP Provider ID** tab and then clicking on the **My Pended Pharmacies** link in the **Pharmacies Queue** box.

5. When you have completed your changes and you are ready to submit them to NCPDP, click the **Submit to NCPDP** link in the **Actions** box or at the bottom of the profile page. Depending on the data you changed, you may be required to enter your PIN. Changes to the following data require a PIN to submit to NCPDP: Pharmacy DBA Name, Pharmacy Legal Name, Store Open / Close Date, Physical Address, NPI Number and confirmation document, Federal Tax ID and documentation, State Tax ID, Class Designation, Taxonomy Code(s), and Authorized Official.

When submitting a change to your NCPDP Provider ID pharmacy profile, the following fields will be validated:

• Date fields are valid dates
• Expiration dates in future
• Combination of class designation and dispenser type/taxonomy codes are correct
• NPI number is valid

- DEA registration number is valid
- Physical location phone number is a landline phone number

The following fields will be checked against other NCPDP Provider ID pharmacy profiles for duplicates*:

- Federal Tax ID
- Physical address
- Pharmacy license number
- DEA registration number
- NPI number
- Physical location phone

*Note: NCPDP Online will allow some duplicates and not others. You will be prompted with more information and advised on how to proceed when a duplicate is found.

If you are an **Editor**, your changes will be submitted to NCPDP for verification AFTER your organization's **Approver** or **Admin** approves the changes. Once NCPDP verifies the changes to your NCPDP Provider ID pharmacy profile, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If your changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4.2   Change of Relationship/Payment Center

You can add, update or deactivate a relationship or payment center associated with your pharmacy. If you have a third party contracting relationship (typically referred to as a PSAO), your PSAO can make these changes on your behalf. If this is the case, you must APPROVE any changes made by your PSAO *(see 7.0 Provide 3rd Party Access to Your NCPDP Provider ID Pharmacy Profile)*.

There are five types of relationships – (1) Chain, (2) Franchise, (3) Purchasing Buying Group, (4) Third Party Contracting Group and (5) Third Party Reconciliation Entity. You can have multiple relationships, but NCPDP Online will perform some basic validation checks (e.g. you cannot associate a chain and franchise relationship with the same pharmacy profile or you can only have multiple third party contracting group relationships if you have multiple taxonomy codes such as long term care and community/retail pharmacy).

1. Click the **NCPDP Provider ID** tab.

2. Click the **Update** link for the pharmacy you wish to change a relationship or payment center.

3. Choose **Change of Relationship/Payment Center** and click the **OK** button.

A list of your active relationships and payment centers are provided. You can **Add Relationship, Add Payment Center**, **Update**, or **Deactivate** a relationship/payment center. In all cases, you will be required to enter your PIN for authentication before changes will be submitted to NCPDP for verification. Once NCPDP verifies, you will be alerted based on your alert preferences *(see 3.4*

Change Your Alert Preferences). If your changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

To add a relationship:

1. Click the **Add Relationship** button to add a relationship.

2. Choose the relationship type from the **Select Relationship Type** list. The screen is refreshed and a list of relationships, based on relationship type, is presented. Choose a relationship from the **Select Relationship** list.

    If adding a payment center with this relationship, click the **Add** button and choose a payment center from the **Select Payment Center** list. The payment center will be "linked" to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future.

    To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure your payments are delivered to the proper location.

3. Enter the effective date of the relationship (and payment center, if applicable) in the **Select Relationship ID Effective Date** box.

4. If you have an electronic copy of your affiliation agreement, click the **Browse** button and select the file from your computer. If you have a print copy of your affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to your pharmacy profile.

    If you do not have a copy of your affiliation agreement, you can still proceed.

5. If this is your primary relationship, click the check box for **Is Primary**. You are allowed to identify one relationship as your primary relationship. A purchasing buying group or third party reconciliation entity cannot be designated as Primary.

6. Click the **Submit** button to submit to NCPDP for verification.

To add a payment center:

1. Click the **Add Payment Center** button to add a payment separate from a specific relationship (e.g. not "linked to a relationship).

2. Choose a payment center from the **Select Payment Center** list. To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure your payments are delivered to the proper location.

3. Enter the effective date of the payment center in the **Select Relationship ID Effective Date** box.

4. If you have an electronic copy of your affiliation agreement, click the **Browse** button and select the file from your computer. If you have a print copy of your affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to your pharmacy profile.

   If you do not have an affiliation agreement for the payment center, you can still proceed.

5. Click the **Submit** button to submit to NCPDP for verification.

To update an existing relationship or payment center:

1. Click the **Update** link for the relationship or payment center you wish to update. For relationships, you can only add a payment center if one is not already associated, attach an affiliation agreement if one is not attached and set the relationship as "primary." If you wish to make any other changes, you must deactivate the current relationship and create a new relationship.

   For payment centers, you can only attach an affiliation agreement if one is not attached. If you wish to make any other changes, you must deactivate the current payment center and create a new payment center.

2. If updating a relationship and adding a payment center, click the **Add** button and choose a payment center from the **Select Payment Center** list. The payment center will be "linked" to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future.

   To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure your payments are delivered to the proper location.

3. If you have an electronic copy of your affiliation agreement, click the **Browse** button and select the file from your computer. If you have a print copy of your affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to your pharmacy profile.

   If you do not have a copy of your affiliation agreement, you can still proceed.

4. If updating a relationship and this is your primary relationship, click the check box for **Is Primary**. You are allowed to identify one relationship as your primary relationship. A purchasing buying group, third party reconciliation entity or payment center cannot be designated as Primary.

5. Click the **Submit** button to submit to NCPDP for verification.

To deactivate a relationship or payment center:

1. Click the **Deactivate** link for the relationship or payment center you wish to deactivate.

2. You can choose to simply deactivate a relationship or payment center, or deactivate and replace with a new relationship or payment center.

   Click the **Deactivate** link associated with the individual relationship or payment center, or the linked relationship and payment center.

   If you choose to deactivate and replace a relationship or payment center with a new relationship or payment center, click the **Deactivate and replace with a new relationship** radio button. Otherwise, click the **Deactivate relationship** radio button.

3. Enter an **Effective Date** for the deactivation.

4. Click the **Submit** button. You will be asked to enter your PIN for verification. If you chose to replace with a new relationship, you will be able to enter the new relationship now exactly the same way you add a new relationship or payment center *(see **Add** above)*.

4.3 Update Multiple NCPDP Provider ID Profiles Using Global Update

You can utilize the Global Update utility to make the SAME change to multiple NCPDP Provider ID profiles.

1. Click the **NCPDP Provider ID** tab.

2. Click the **Global Update** link in the **Actions** box.

3. Enter the search criteria for the pharmacies you wish to update. Click the **Search** button to view all pharmacies matching the search criteria. Click the **Reset** link to reset the search criteria.

4. Select one or more pharmacies from the search results by clicking the check box next to each pharmacy. If you wish to select ALL pharmacies, click the check box above in the light blue header row of the search results (next to **Pharmacy Name**).

   Note: When you select ALL pharmacies you are selecting all pharmacies on this PAGE of the search results. If you wish to increase the number of pharmacies on the page of search results, go to the bottom of the page. By default, 50 pharmacy records are displayed per page. Click the **100**, **300**, or **500** links to increase the number of pharmacy records displayed per page.

5. When you have selected the pharmacies, click the **Add to Selected Pharmacies** button. The pharmacies will be added to the **Pharmacies Selected for Global Update** box.

   To remove a pharmacy from the **Pharmacies Selected for Global Update** box, click the **X** next to the pharmacy name/NCPDP Provider ID. If you wish to remove all pharmacies, click the **Clear Search** button.

   When all pharmacies have been selected for the global update, click the **Global Update** button.

6. Enter the updated values for one or more of the pharmacy profile fields – only the following pharmacy fields can be updated via global update:

   - Pharmacy Legal Name
   - Pharmacy DBA Name
   - Mailing Address

- Federal Tax ID
- Authorized Official
- Contact Information

7. Click the **Submit** link to submit to NCPDP. Depending on the data you changed, you may be required to enter your PIN. Changes to the following data require a PIN to submit to NCPDP: Pharmacy DBA Name, Pharmacy Legal Name, Federal Tax ID and Authorized Official. If you are an **Editor**, your changes will be submitted to NCPDP for verification AFTER your organization's **Approver** or **Admin** approves the changes.

   Once NCPDP verifies the changes to your NCPDP Provider ID pharmacy profile, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If your changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4.4   Update Multiple NCPDP Provider ID Profiles Using Batch Export

You can utilize the Batch Export utility to change multiple NCPDP Provider ID profiles in batch.

1. Click the **NCPDP Provider ID** tab.

2. Click the **Batch Export** link in the **Actions** box.

3. Enter the search criteria for the pharmacies you wish to export. Click the **Search** button to view all pharmacies matching the search criteria. Click the **Reset** link to reset the search criteria.

4. Select one or more pharmacies from the search results by clicking the check box next to each pharmacy. If you wish to select ALL pharmacies, click the check box above in the light blue header row of the search results (next to **Pharmacy Name**).

   Note: When you select ALL pharmacies you are selecting all pharmacies on this PAGE of the search results. If you wish to increase the number of pharmacies on the page of search results, go to the bottom of the page. By default, 50 pharmacy records are displayed per page. Click the **100**, **300**, or **500** links to increase the number of pharmacy records displayed per page.
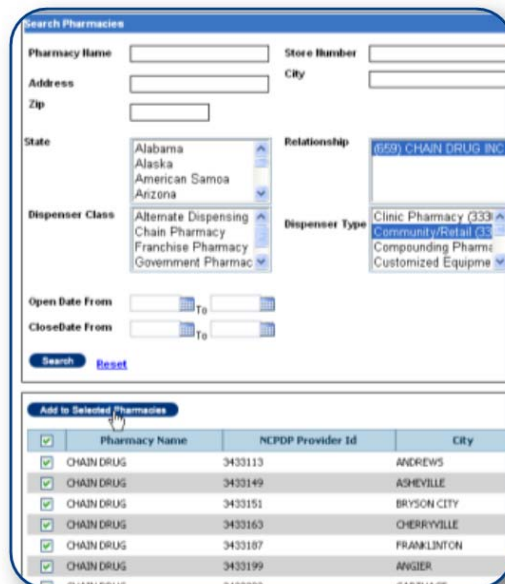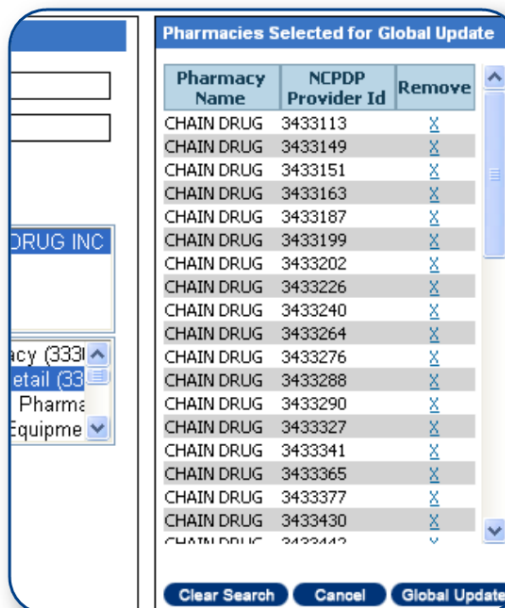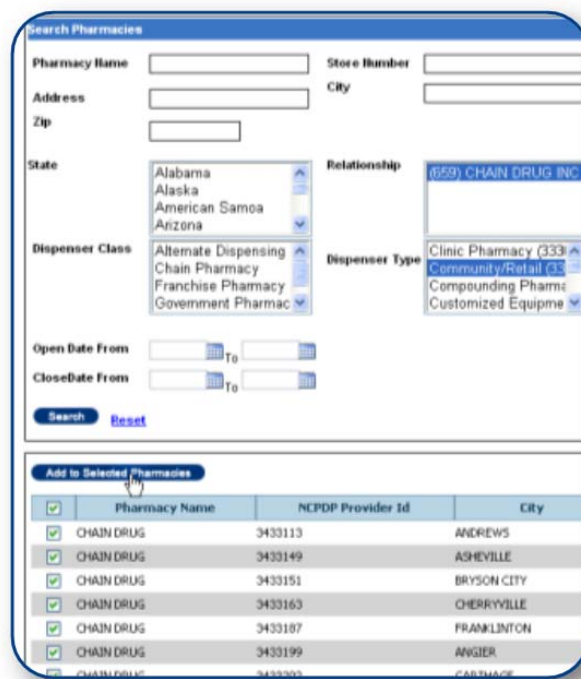
5. Once you have selected the pharmacies, click the **Add to Selected Pharmacies** button. The pharmacies will be added to the **Pharmacies Selected for Batch Export** box.

    To remove a pharmacy from the **Pharmacies Selected for Batch Export** box, click the **X** next to the pharmacy name/NCPDP Provider ID. If you wish to remove all pharmacies, click the **Clear Search** button.

6. When all pharmacies have been selected for the batch export, click the **Batch Export** button. A Microsoft Excel file will be generated and you will be asked to **Open** the file or **Save** the file to your desktop.

7. The Microsoft Excel file provides the following data for each pharmacy:
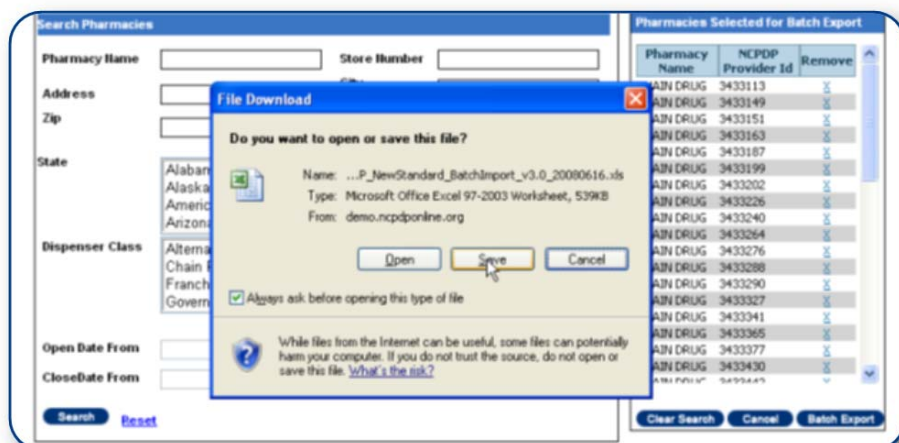
    - Pharmacy Data (pharmacy profile data)
    - Additional Dispenser Types
    - Additional Medicaid IDs
    - Additional Medicare IDs
    - Additional Taxonomy Codes
    - Services Provided
    - Languages Spoken

    Make all updates to your pharmacy profiles on the spreadsheet. DO NOT change the format of the spreadsheet (e.g. remove columns). Any changes to the format will adversely affect the ability to import the file back into the NCPDP Online database.

8. Once all changes have been made to the pharmacy spreadsheet, upload the spreadsheet to NCPDP Online. Click the **NCPDP Provider ID** tab, then click the **Batch Import** link in the **Actions** box.

9. Click the **Browse** button to select the spreadsheet from your computer. Click the **Submit** button to upload the file.

---

10. The spreadsheet will be validated for syntax. If there are any issues, you will be alerted by NCPDP to correct the issues.

After the syntax check, the changes to your NCPDP Provider ID pharmacy profiles will be added to NCPDP Online. Once NCPDP verifies the changes, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If your changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5.0 Create a New NCPDP Provider ID Pharmacy Profile

You have two options when creating a new NCPDP Provider ID pharmacy profile. You can create an NCPDP Provider ID for a <u>new location</u> or create an additional NCPDP Provider ID for an <u>existing location</u>.

You will be required to provide the following documentation:

- State Pharmacy License
- Pharmacy DEA Registration
- Federal Tax ID documentation
- NPI Confirmation document

You may be creating a new NCPDP Provider ID prior to receiving some of the above documentation. For example, if you do not yet have your pharmacy license you can use the site visit/inspection report documentation. NCPDP will apply a temporary expiration date to any missing or substitute documentation. You will be alerted to update your documentation after the new NCPDP Provider ID is created.

5.1 New NCPDP Provider ID for New Location

The NCPDP Online process for creating a new NCPDP Provider ID is the same as the traditional paper forms, with one exception. In the paper forms, if your new pharmacy had one or more relationships (e.g. 3rd party contracting group, franchise, chain) you would include those relationships at the time you were submitting the application for the NCPDP Provider ID.

It is now a two step process online. First, you submit your new NCPDP Provider ID pharmacy profile, which is verified by NCPDP and a new NCPDP Provider ID is assigned. Then you edit your new NCPDP Provider ID and add the appropriate relationships.

To create a new NCPDP Provider ID for a pharmacy at a new location:

1. Click the **NCPDP Provider ID** tab.

2. Click the **New NCPDP Provider ID** link in the **Actions** box.

3. Select the appropriate **Business Type** for your pharmacy.

4. Select **New NCPDP Provider ID for a new location** and click the **Submit** button.

5. Enter the primary information required to begin the process of creating a new NCPDP Provider ID. The following information is required: Pharmacy DBA Name, Pharmacy Legal Name and Store Open/Effective Date.

6. Click the **Next** link in the **Actions** box or at the bottom of the page to proceed and complete the NCPDP Provider ID pharmacy profile. Required fields are highlighted with a RED *. You can click on most field labels to get additional help/information regarding the field. For example, click on the **Pharmacy DBA Name** label and a pop-up help box appears defining the Pharmacy DBA Name field and helpful hints for what should be entered.

The NCPDP Provider ID pharmacy profile is separated into the following sections: Primary Information, Physical Location, Mailing Address, NPI Information, License Information, Class Designation, Other Services, Hours of Operation, Taxonomy Codes, Authorized Official and Payment. Click the appropriate link in the **NCPDP Provider Profile** box to jump to one of these sections. To return to the top of the profile, click the **back to top** link in each section.

Some parts of your profile will require a document upload. Documents required for your NCPDP Provider ID pharmacy profile includes: State pharmacy license, pharmacy DEA registration, Federal Tax ID documentation, and NPI confirmation document.

If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Browse** button and selecting the file from your computer.

If you do not have the document electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll free number indicated on the cover sheet. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

It is important you use the coversheet generated for the specific document you are sending when you fax. It contains important information for NCPDP to properly match the document with your

profile. You may need to generate more than one cover sheet and send more than one fax if you have more than one document to send to NCPDP. Do not batch all documents under one coversheet.

7. If you are not ready to submit your new pharmacy profile to NCPDP, you can save your changes by clicking the **Pend Changes** link in the **Actions** box or at the bottom of the profile page. You can access your pended pharmacy profile by going to the **NCPDP Provider ID** tab and then clicking on the **My Pended Pharmacies** link in the **Pharmacies Queue** box.

8. Near the bottom of the pharmacy profile, download and sign the **Authorized Official Signature** document. If you can scan the document and load electronically, click the **Browse** button and select the file from your computer. If you only have the print copy of your signed authorized official signature document, click the **click here** link to print a fax coversheet and fax the authorized official signature document to the toll free number provided. The authorization document will be converted to an electronic file (Adobe pdf) and attached to your pharmacy profile.

9. Near the bottom of the pharmacy profile, choose a payment method in the **Payment** section.

   If you chose **Check** or **Money Order** in the **Payment** box, you must click the **click here and print this form** link to open a fax coversheet page. Print this page and send along with your payment to NCPDP. This will ensure your payment is applied to the correct NCPDP Provider ID application.

   If you chose **Credit Card**, you will follow the instructions on the screen to submit a credit card payment. NCPDP utilizes one of the largest, secure 3rd party only payment processors (Verisign Payment Services acquired by PayPal). This means NCPDP does <u>not</u> have access to your credit card information and does <u>not</u> store your credit card information in the NCPDP Online database. NCPDP ONLY receives a confirmation if your credit card payment is accepted.

10. When you have completed your pharmacy profile and you are ready to submit to NCPDP, click the **Submit to NCPDP** link in the Actions box or at the bottom of the profile page.

    When submitting your new NCPDP Provider ID pharmacy profile, the following fields will be validated:
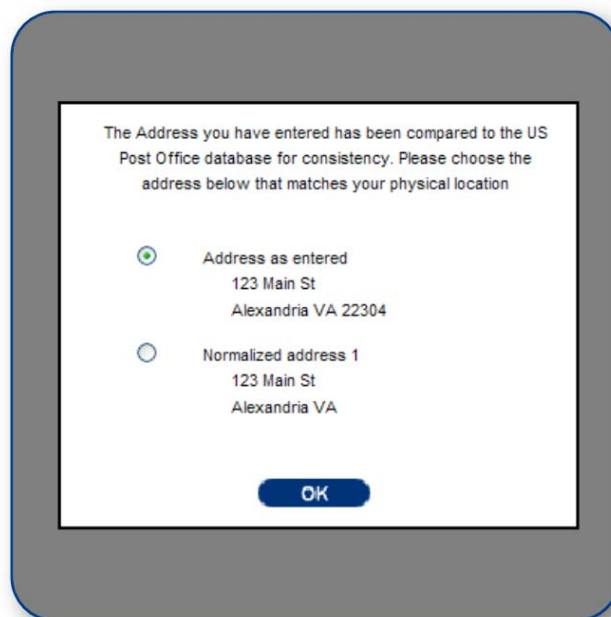
    - Date fields are valid dates
    - Expiration dates in future
    - Combination of class designation and dispenser type/taxonomy codes are correct
    - NPI number is valid
    - DEA registration number is valid
    - Physical location phone number is a landline phone number

    The following fields will be checked against other NCPDP Provider ID pharmacy profiles for duplicates*:

- Federal Tax ID
- Physical address
- Pharmacy license number
- DEA registration number
- NPI number
- Physical location phone

Note: NCPDP Online will allow some duplicates and not others. You will be prompted with more information and advised on how to proceed when a duplicate is found.

11. Once all validation and duplicate checks are complete, you will be provided a normalized address based on the physical address you entered in your pharmacy profile. Select the address that most closely matches the physical address of your pharmacy. It is important to choose the normalized address if it correctly reflects your pharmacy's physical address. This will help ensure your physical address (normalized) will match the address stored in CMS' NPPES system. NCPDP uses the same software provider to normalize your address as CMS uses for the NPPES system.

The Address you have entered has been compared to the US Post Office database for consistency. Please choose the address below that matches your physical location

○ Address as entered
123 Main St
Alexandria VA 22304

○ Normalized address 1
123 Main St
Alexandria VA

OK

If you choose not to select the normalized address, NCPDP will still store it for you, but will not replace the physical address you entered.

12. Once NCPDP verifies your new pharmacy profile, a new NCPDP Provider ID will be generated and you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. You can then associate any relationships with the new NCPDP Provider ID *(see 4.2 Change of Relationship/Payment Center)*.

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5.2 Additional NCPDP Provider ID for Existing Location

There may be times when you require an additional NCPDP Provider ID for an existing pharmacy location. If your pharmacy requires a second NPI number, you should apply for a second NCPDP Provider ID. An example would be a retail pharmacy who also provides long-term care (LTC) products/services. You must have a different taxonomy code and dispenser type for the additional

NCPDP Provider ID. This may require you to update our current NCPDP Provider ID and remove the taxonomy code and dispenser type for which you wish to set up a second NCPDP Provider ID.

If you choose to create a new NCPDP Provider ID for an existing location, you will be asked to select the current location from your list of pharmacies in your **NCPDP Provider ID** tab. Your new pharmacy profile will be pre-filled with the values from the existing pharmacy profile less the following data fields:

- Taxonomy Codes
- Dispenser Type
- NPI (check for duplicate logic)
- Relationship information

When submitting your new NCPDP Provider ID pharmacy profile based on an existing location, do not change any of the following information or you will be charged a fee for a new NCPDP Provider ID:

- Legal Business Name
- Federal Tax ID
- Pharmacy Class/Designation
- Physical Address
- Authorized Official information on file

To create a new NCPDP Provider ID for an existing location:

1. Click the **NCPDP Provider ID** tab.

2. Click the **New NCPDP Provider ID** link in the **Actions** box.

3. Select the appropriate **Business Type** for your pharmacy.

4. Select **Additional NCPDP Provider ID for an existing location** and click the **Submit** button.

5. Select the existing pharmacy location from your list of pharmacies and click the **Submit** button.

6. Complete the pre-filled NCPDP Provider ID pharmacy profile. Required fields are highlighted with a RED *. You can click on most field labels to get additional help/information regarding the field. For example, click on the **Pharmacy DBA Name** label and a pop-up help box appears defining the Pharmacy DBA Name field and helpful hints for what should be entered.

The NCPDP Provider ID pharmacy profile is separated into the following sections: Primary Information, Physical Location, Mailing Address, NPI Information, License Information, Class Designation, Other Services, Hours of Operation, Taxonomy Codes, Authorized Official and Payment *(if applicable)*. Click the appropriate link in the **NCPDP Provider Profile** box to jump to one of these sections. To return to the top of the profile, click the **back to top** link in each section.

Some parts of your profile will require a document upload. Documents required for your NCPDP Provider ID pharmacy profile includes: State pharmacy license, pharmacy DEA registration, Federal Tax ID documentation, and NPI confirmation document. With the exception of the NPI, these documents may be the same documents as you submitted to obtain your original NCPDP Provider ID, or they may be different, depending upon the dispenser type and taxonomy code.

If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Browse** button and selecting the file from your computer.

If you do not have the document electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll free number indicated. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

7. If you are not ready to submit your new pharmacy profile to NCPDP, you can save your changes by clicking the **Pend Changes** link in the **Actions** box or at the bottom of the profile page. You can access your pended pharmacy profile by going to the **NCPDP Provider ID** tab and then click the **My Pended Pharmacies** link in the **Pharmacies Queue** box.

8. Near the bottom of the pharmacy profile, download and sign the **Authorized Official Signature** document. If you can scan the document and load it electronically, click the **Browse** button and select the file from your computer. If you only have the print copy of your signed authorized official signature document, click the **click here** link to print a fax coversheet and fax the authorized official signature document to the toll free number provided. The authorization document will be converted to an electronic file (Adobe pdf) and attached to your pharmacy profile.

9. When you have completed your pharmacy profile and you are ready to submit to NCPDP, click the **Submit to NCPDP** link in the **Actions** box or at the bottom of the profile page.

    When submitting your new NCPDP Provider ID pharmacy profile, the following fields will be validated:

    - Date fields are valid dates
    - Expiration dates in future
    - Combination of class designation and dispenser type/taxonomy codes are correct
    - NPI number is valid
    - DEA registration number is valid
    - Physical location phone number is a landline phone number

10. Once all validation checks are complete, you will be provided a normalized address based on the physical address you entered in your pharmacy profile. Select the address that most closely matches the physical address of your pharmacy. It is important to choose the normalized address if it correctly reflects your pharmacy's physical address. This will help ensure your physical address (normalized) will match the address stored in CMS' NPPES system. NCPDP uses the same software provider to normalize your address as CMS uses for the NPPES system.

    If you choose not to select the normalized address, NCPDP will still store it for you, but will not replace the physical address you entered.

The Address you have entered has been compared to the US Post Office database for consistency. Please choose the address below that matches your physical location

◉ Address as entered
    123 Main St
    Alexandria VA 22304

◯ Normalized address 1
    123 Main St
    Alexandria VA

OK
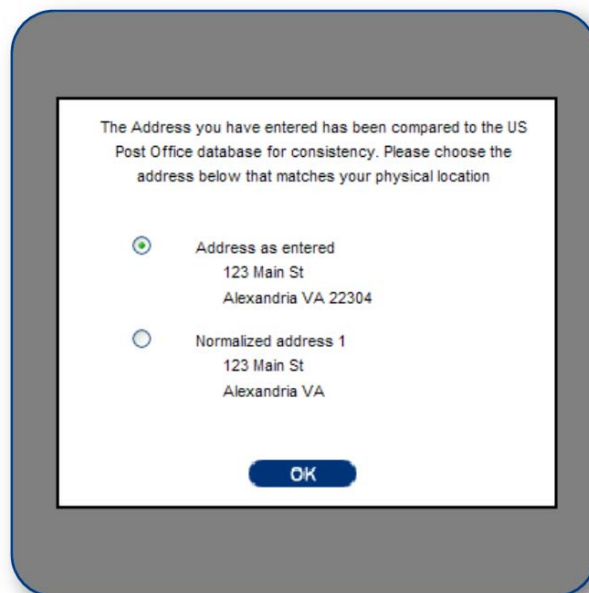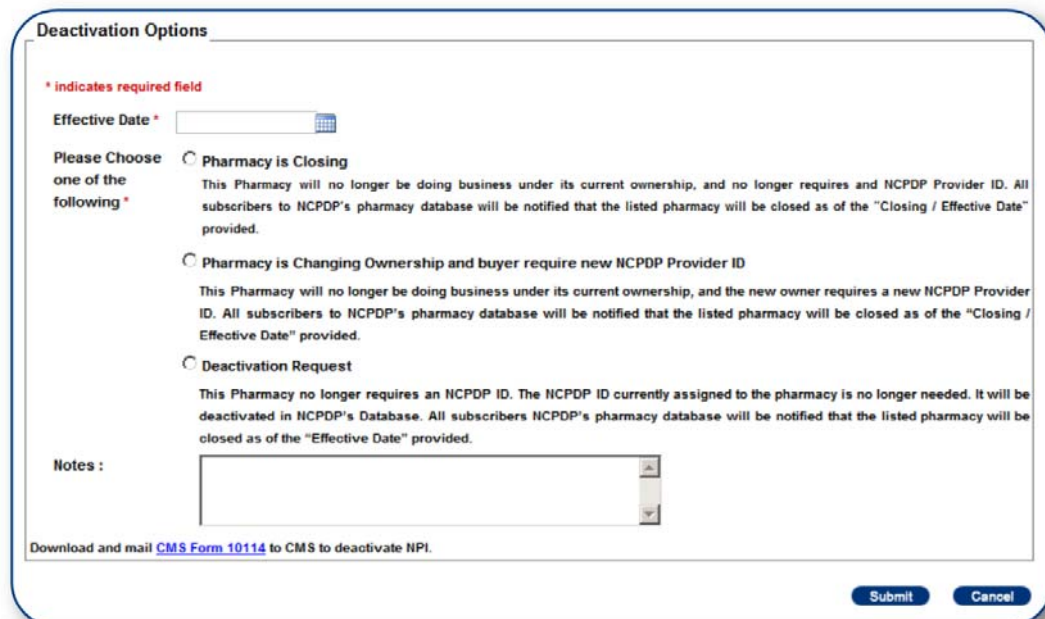
11. Once NCPDP verifies your new pharmacy profile, a new NCPDP Provider ID will be generated and you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. You can then associate any relationships with the new NCPDP Provider ID *(see 4.2 Change of Relationship/Payment Center)*.

    If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

6.0   Deactivate an NCPDP Provider ID Pharmacy Profile

Deactivate an NCPDP Provider ID if you are closing your pharmacy, changing ownership and the buyer requires a new NCPDP Provider ID, or you simply no longer require the NCPDP Provider ID.

1. Click the **NCPDP Provider ID** tab.

2. All your pharmacies are listed. To search for a pharmacy, enter the NCPDP number and click the **Search** button OR click the **Advanced Search** link, enter search criteria and click the **Search** button. From the search results, click the **Update** link for the pharmacy you wish to update.

3. Select **Deactivate NCPDP Provider ID** and click the **OK** button.

4. Enter the **Effective Date**.

5. Choose the reason for deactivating your NCPDP Provider ID.

6. Enter any notes you feel NCPDP may require when verifying your deactivation request.

7. A link is provided to download **CMS Form 10114**. Federal Law requires that you complete the form and mail it to CMS to deactivate the NPI that is associated with this NCPDP Provider ID. This can only be done by mail.

8. Click the **Submit** button to submit to NCPDP for verification. Once NCPDP verifies your deactivation, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

Deactivation Options

* indicates required field

Effective Date * [   ] 🖩

Please Choose one of the following *

○ Pharmacy is Closing

This Pharmacy will no longer be doing business under its current ownership, and no longer requires and NCPDP Provider ID. All subscribers to NCPDP's pharmacy database will be notified that the listed pharmacy will be closed as of the "Closing / Effective Date" provided.

○ Pharmacy is Changing Ownership and buyer require new NCPDP Provider ID

This Pharmacy will no longer be doing business under its current ownership, and the new owner requires a new NCPDP Provider ID. All subscribers to NCPDP's pharmacy database will be notified that the listed pharmacy will be closed as of the "Closing / Effective Date" provided.

○ Deactivation Request

This Pharmacy no longer requires an NCPDP ID. The NCPDP ID currently assigned to the pharmacy is no longer needed. It will be deactivated in NCPDP's Database. All subscribers NCPDP's pharmacy database will be notified that the listed pharmacy will be closed as of the "Effective Date" provided.

Notes : [   ]

Download and mail CMS Form 10114 to CMS to deactivate NPI.

[Submit] [Cancel]

7.0   Provide 3rd Party Access to Your NCPDP Provider ID Pharmacy Profile

There are two ways you can provide a 3rd party access to your NCPDP Provider ID pharmacy profiles:

1.   A 3rd party group (such as a PSAO or buying group) can request access

2.   You can proactively grant access

If a 3rd party has access to and makes a change to your NCPDP Provider ID pharmacy profile, you must APPROVE those changes before they are submitted to NCPDP *(see 8.0 Approve Changes to Your NCPDP Provider ID Pharmacy Profile)*. If the following fields are changed by a 3rd party, your approval is required:

- Pharmacy DBA Name
- Pharmacy Legal Name
- Store Open/Effective Date
- NPI Number and Confirmation document
- Federal Tax ID and documentation
- State Tax ID
- State Pharmacy License

- Pharmacy DEA Registration
- Class Designation
- Dispenser Type
- Taxonomy Code(s)
- Pharmacy Physical Address
- Pharmacy Authorized Official
- Relationships and Payment Centers

7.1   3rd Party Requests Access to Your NCPDP Provider ID Pharmacy Profile

You will be alerted if a 3rd party (such as a PSAO or buying group) requests access to your NCPDP Provider ID pharmacy profile. You should be expecting this request and in most cases, would have already signed an affiliation agreement with this 3rd party.

If you do not know why you are receiving the request or you do not work with or intend to work with this 3rd party, you should REJECT the request.

1.   Click the **NCPDP Provider ID** tab.

2.   Click the **Waiting for Approvals** link in the **Pharmacies Queue** box.

3.   Click the pharmacy name (link) of the pharmacy you wish to approve/reject.

4.   The approve/reject box will be titled **Approve/Reject Association Request**. A link to an attached affiliation agreement (if available) will be provided, as well as the name of the authorized official from the 3rd party that is making the request.
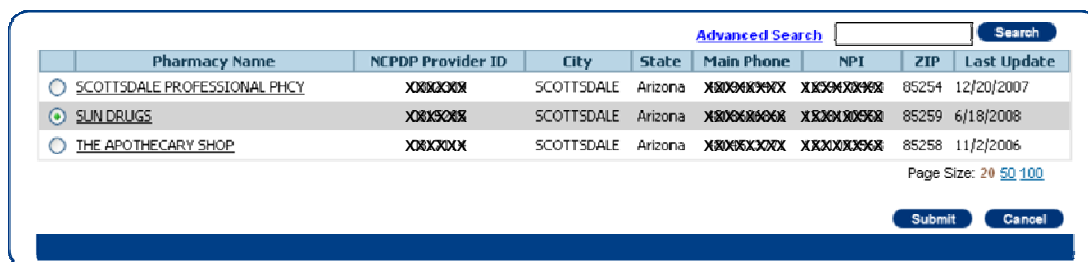
Click the **Approve** button to accept and provide this 3rd party access to your NCPDP Provider ID pharmacy profile.

Click the **Reject** button to <u>not</u> allow this 3rd party access to your NCPDP Provider ID pharmacy profile.

7.2   Proactively Grant Access to Your NCPDP Provider ID Pharmacy Profile

You can grant a 3rd party (such as a PSAO or buying group) access to your NCPDP Provider ID pharmacy profile.

1. Click the **NCPDP Provider ID** tab.

2. Click the **Access to My NCPDP Provider IDs** link in the **Actions** box.

3. Select the pharmacy for which you wish to provide access and click the **Submit** button.
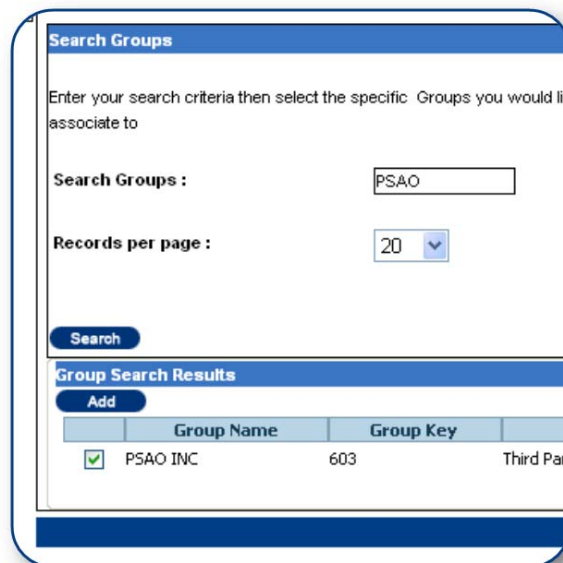
4. Search for the 3rd party **Group** you wish to provide access. Enter the name of the group in the **Search Groups** box and click the **Search** button. Results will appear below in the **Group Search Results** box.

5. Select the 3rd party from the search results by checking the box next to the name of the 3rd party, then click the **Add** button. The 3rd party is now associated with this NCPDP Provider ID pharmacy profile until you revoke that privilege. You can do so by selecting the 3rd party from the **Selected Groups** box and clicking the **Remove** button.

8.0　Approve Changes to Your NCPDP Provider ID Pharmacy Profile

If you are a user with a **Chain Approver** or **Chain Admin** role *(see 11.1 Manage Users)*, you are responsible for approving and rejecting proposed changes to your NCPDP Provider ID pharmacy profile. You must approve these changes prior to submission to NCPDP.

Changes can be submitted by a user within your organization that has a **Chain Edit** role *(see 11.1 Manage Users)* or by a 3rd party tha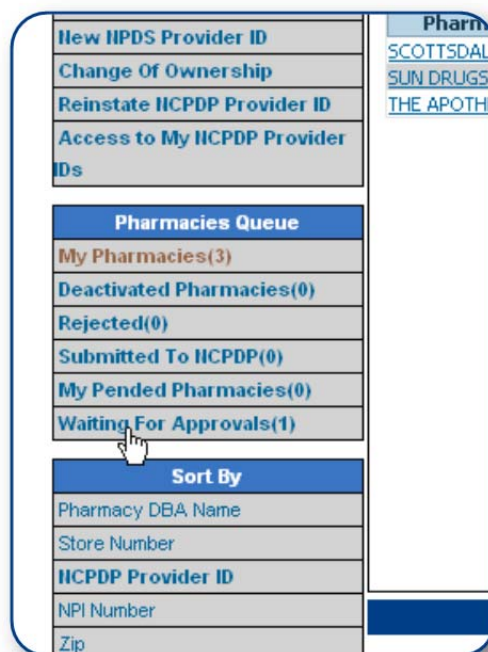t you provide permission to view and edit your NCPDP Provider ID pharmacy Profile *(see 7.0 Provide a 3rd Party Access to Your NCPDP Provider ID Pharmacy Profile)*. This allows you to grant edit and update permissions to employees at the store level without compromising your oversight of the data.

To review and approve/reject proposed changes to your NCPDP Provider ID pharmacy profile:

1. Click the **NCPDP Provider ID** tab.

2. Click the **Waiting for Approvals** link in the **Pharmacies Queue** box. A count of the number of NCPDP Provider ID pharmacy profiles with changes waiting for approval is displayed in parentheses.

3. Click the pharmacy name (link) of the pharmacy for which you wish to approve/reject proposed changes.

4. Click the **Pending Approvals** link or **Click Here** link at the top of the pharmacy profile. A count of the number of changes to this pharmacy profile is displayed in parentheses.

5. You can elect to **Approve All** or **Reject All** by clicking on the corresponding radio button. If you choose to approve or reject each proposed change individually, click the radio button that corresponds with the appropriate **Approve** or **Reject** for each change. For each change, the section where the change can be found is indicated, as well as the data field description, original value of the data field and the new value of the data field.

6. Click the **Submit** link to approve/reject changes. Approved changes are submitted to NCPDP for verification.

9.0   Change of Ownership – One Pharmacy at a Time*

If you need to report a large sale, merger or acquisition please contact NCPDP to request the Change of Ownership be processed in a batch environment.

You can initiate a change of ownership if you will become the owner of the pharmacy involved in the transaction. There are two options regarding the NCPDP Provider ID for the pharmacy:

1. You will obtain a new NCPDP Provider ID (and NPI number) for the pharmacy you are purchasing.

2. You will keep the pharmacy's existing NCPDP Provider ID and NPI number.

9.1   Obtain a New NCPDP Provider ID

To initiate a change of ownership where you will obtain a new NCPDP Provider ID:

1. Click the **NCPDP Provider ID** tab.

2. Click the **Change of Ownership** link in the **Actions** box.

3. Select the **Type of Ownership Change**.

4. Enter the seller's **NCPDP Provider ID** of the pharmacy involved in this transaction.

5. Enter the **Effective Date** of the ownership change.

6. Select **New NCPDP Number**.

7. If you have the **Bill of Sale** document electronically, upload it by clicking the **Browse** button and selecting the file from your computer.

    If you do not have the **Bill of Sale** electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the bill of sale to the toll free number indicated. Your bill of sale will be converted to an electronic file (Adobe pdf file) and attached to this change of ownership request.

8. Download and sign the **Termination Form signature page**. If you can scan the document and load electronically, click the **Browse** button and select the file from your computer. If you only have the print copy of your signed Termination Form signature page, click the **click here** link to print a fax coversheet and fax the Termination Form signature page to the toll free number provided. The Termination Form signature page will be converted to an electronic file (Adobe pdf) and attached to this change of ownership request.

9. Complete the remainder of the NCPDP Provider ID pharmacy profile for the ownership change. Required fields are highlighted with a RED *.

    Some parts of your profile will require a document upload. Documents required include:

State pharmacy license, pharmacy DEA registration, Federal Tax ID documentation, NPI confirmation document and EFIO authorization (if EFIO permission is granted to NCPDP, *see 4.3 Modify EFIO Permissions*). If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Browse** button and selecting the file from your computer. If you do not have the document electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll free number indicated on the cover sheet. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

It is important you use the coversheet generated for the specific document you are sending when you fax. It contains important information for NCPDP to properly match the document with your profile. You may need to generate more than one cover sheet and send more than one fax if you have more than one document to send to NCPDP. Do not batch all documents under one coversheet.

10. Choose a payment method. If you chose **Mail Check Separately** or **Money Order** in the Payment box, you must click the **click here** link and print this form link to open a separate fax coversheet page. This page has a unique pharmacy key number on it which NCPDP will use to match your payment with your request for a new NCPDP Provider ID. Print this page and mail it along with your payment to NCPDP. This will ensure your payment is applied to the correct NCPDP Provider ID change of ownership application.

If you chose **Credit Card**, you will follow the instructions on the screen to submit a credit card payment. NCPDP utilizes one of the largest, secure 3rd party only payment processors (Verisign Payment Services acquired by PayPal). This means NCPDP does not have access to your credit card information and does not store your credit card information in the NCPDP Online database. NCPDP ONLY receives a confirmation if your credit card payment is accepted.

11. Click the **Submit** button to submit the change of ownership application to NCPDP. Once NCPDP verifies your change of ownership, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The pharmacy will be added to your **My Pharmacies** queue on the **NCPDP Provider ID** tab.

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

9.2   Keep an Existing NCPDP Provider ID

To initiate a change of ownership where you will keep an existing NCPDP Provider ID:

1. Click the **NCPDP Provider ID** tab.

2. Click the **Change of Ownership** link in the **Actions** box.

3. Select the **Type of Ownership Change**.

4. Enter the seller's **NCPDP Provider ID** of the pharmacy involved in this transaction.

5. Enter the **Effective Date** of the ownership change.

6. Select **Keep Existing NCPDP/NPI Number**.

7. If you have the **Bill of Sale** document electronically, upload it by clicking the **Browse** button and selecting the file from your computer.

    If you do not have the **Bill of Sale** electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the bill of sale to the toll free number indicated. Your bill of sale will be converted to an electronic file (Adobe pdf file) and attached to this change of ownership request.

8. If you have the **Notarized Authorization** document electronically, upload it by clicking the **Browse** button and selecting the file from your computer.

    If you do not have the **Notarized Authorization** electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the bill of sale to the toll free number indicated. Your notarized authorization will be converted to an electronic file (Adobe pdf) and attached to this change of ownership request.

9. Complete the remainder of the NCPDP Provider ID pharmacy profile for the ownership change. Required fields are highlighted with a RED *.

    Some parts of your profile will require a document upload. Documents required include: State pharmacy license, pharmacy DEA registration, Federal Tax ID documentation, NPI confirmation document and EFIO authorization (if EFIO permission is granted to NCPDP, *see 4.3 Modify EFIO Permissions*). If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Browse** button and selecting the file from your computer. If you do not have the document electronically, click the associated **click here** link. A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll free number indicated on the cover sheet. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

    It is important you use the coversheet generated for the specific document you are sending when you fax. It contains important information for NCPDP to properly match the document with your profile. You may need to generate more than one cover sheet and send more than one fax if you have more than one document to send to NCPDP. Do not batch all documents under one coversheet.

10. Choose a payment method. If you chose **Mail Check Separately** or **Money Order** in the Payment box, you must click the **click here** link and print this form link to open a separate fax coversheet page. This page has a unique pharmacy key number on it which NCPDP will use to match your payment with your request for a new NCPDP Provider ID. Print this page and mail it along with your payment to NCPDP. This will ensure your payment is applied to the correct NCPDP Provider ID change of ownership application.

If you chose **Credit Card**, you will follow the instructions on the screen to submit a credit card payment. NCPDP utilizes one of the largest, secure 3rd party only payment processors (Verisign Payment Services acquired by PayPal). This means NCPDP does not have access to your credit card information and does not store your credit card information in the NCPDP Online database. NCPDP ONLY receives a confirmation if your credit card payment is accepted.

11. Click the **Submit** button to submit the change of ownership application to NCPDP. Once NCPDP verifies your change of ownership, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The pharmacy will be added to your **My Pharmacies** queue on the **NCPDP Provider ID** tab on the effective date of the ownership change.

    If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

10.0 Reinstate NCPDP Provider ID

You have the option to request reinstatement of a deactivated NCPDP Provider ID. To view your deactivated pharmacies, click the **Deactivated Pharmacies** link in your **Pharmacies Queue** box on the **NCPDP Provider ID** tab.

To reinstate a deactivated pharmacy:

1. Click the **NCPDP Provider ID** tab

2. Click the **Reinstate NCPDP Provider ID** link in the **Actions** box.

3. Select the deactivated pharmacy to be reinstated from the list of pharmacies by clicking the radio button associated with the appropriate pharmacy.

4. Choose a payment method. If you chose **Mail Check Separately** or **Money Order** in the Payment box, you must click the **click here** link and print this form link to open a fax coversheet page. Print this page and send along with your payment to NCPDP. This will ensure your payment is applied to the correct NCPDP Provider ID change of ownership application.

    If you chose **Credit Card**, you will follow the instructions on the screen to submit a credit card payment. NCPDP utilizes one of the largest, secure 3rd party only payment processors (Verisign Payment Services acquired by PayPal). This means NCPDP does not have access to your credit card information and does not store your credit card information in the NCPDP Online database. NCPDP ONLY receives a confirmation if your credit card payment is accepted.

5. Click the **Submit** button to submit the reinstatement request to NCPDP. You will be asked to enter your PIN. Depending upon the length of time the NCPDP Provider ID has been deactivated, NCPDP may request additional documentation as with a new pharmacy application. Once NCPDP verifies your reinstatement request, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The pharmacy will be added to your **My Pharmacies** queue on the **NCPDP Provider ID** tab. You can then associate any relationships with the reinstated NCPDP Provider ID *(see 4.2 Change of Relationship/Payment Center)*.

    If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit or apply for a new NCPDP Provider ID if the previous ID has been deactivated too long.

11.0 Administrator Tools

11.1 Manage Users

A user can have one of four roles in NCPDP Online. User roles are hierarchical, i.e. they build on each other with more responsibilities as you move from **View** to **Admin**.

Chain View → User can only VIEW pharmacy profiles

Chain Edit → User can VIEW and EDIT pharmacy profiles, but cannot submit pharmacy profile adds/changes to NCPDP

Chain Approver → User can VIEW, EDIT and submit pharmacy profile adds/changes to NCPDP, as well as approve changes made by other users with the edit permissions

Chain Admin → User can perform all functions, as well as manage users, relationships, parent organizations and payment centers *(see 11.2 through 11.4)*

To manage users:

1. Click the **Tools** tab.

2. Click the **Manage Users** link in the **Relationships and Users** box.

3. To create a new user, click the **New User** link in the **Actions** box.

    o If there are any Relationships, Parent Organizations or Payment Centers you manage and you would like to provide permission for the new user to manage one or more of these Relationships, Parent Organizations or Payment Centers (only applicable if new user will be **Chain Admin**), select one or more by clicking the checkbox next to the Group Key/Relationship in the **Associated Groups** box.

    o Enter the required information (noted with a RED *), which includes First Name, Last Name, Login Name, Password, PIN and Role.

    o Click **Save** to create the new user. If the user is created successfully, you will receive an alert at the top of the page – **User Creation has been completed successfully**.

    o Click **Return to Users List** to verify the new user is now part of your user list.

4. To update an existing user, click the **Update** link associated with the user.

    o Make any changes to the existing user information. As with creating a new user, required information (noted with a RED *) must be complete.

    o Click **Save** to save changes. If changes have been saved successfully, you will receive an alert at the top of the page – **User has been successfully updated**.

    o Click **Return to Users List**.

5. To deactivate an existing user, click the check box next to the user's name, choose **Deactivate** from the **Select an Action** drop down list and click the **Submit** button. If you have successfully deactivated a user, you will receive an alert at the top of the page – **User deactivated successfully**.

    o   Deactivated users can be found in the **Inactive Users** queue in the **User Status** box. To make the user active again, simply click the **Update** link, click the **Is Active** check box, then click **Save**. The user will then be active and appear in the **Active Users** queue in the **User Status** box.

11.2 Manage Relationships

You may require one or more relationships for your organization. It is important to note that Electronic File Interchange Organization (EFIO) permissions for NCPDP and NPPES are set at the relationship level for your pharmacies.

To manage relationships:

1. Click the **Tools** tab.

2. Click the **Manage Relationships** link in the **Relationships and Users** box.

3. To create a new relationship, click the **Create New Relationship** link in the **Actions** box.

    o   Enter the required information (noted with a RED *), which includes Group Name, Effective Date, Type and Email address.

    o   Select the **Type** of relationship from the pick list.

    o   If a parent organization is associated with this relationship, choose the **Parent Organization** from the pick list.

    o   You can grant NCPDP permission to act as an Electronic File Interchange Organization (EFIO) for the pharmacies associated with this relationship. NCPDP will communicate pharmacy information to CMS National Plan and Provider Enumeration System (NPPES) in order to 1) Obtain a National Provider Identifier (NPI) for a pharmacy, or 2) if the pharmacy already has an NPI, to update the information with CMS automatically. Any changes you make to the NCPDP Provider ID pharmacy profiles associated with this relationship now and in the future will also be transmitted to CMS, until such time that you revoke this permission.

        With the enhancements to NCPDP Online, you can now specify you want NCPDP to act as the EFIO for ADDS and/or for CHANGES. This enables you to obtain the NPI number (if you prefer) and still have NCPDP act as the EFIO for CHANGES. Select **Process New Application** or **Process Changes** as applicable.

        If pharmacies in this relationship are considered a sub-part of the associated Parent Organization, select **Process Parent Orgs** to include Parent Organization Name and

Parent Organization Tax ID when submitting to NPPES. If no Parent Organization record is associated, the Relationship Name and Relationship Tax ID will be submitted to NPPES if **Process Parent Orgs** is selected.

- o Click **Submit** to create the relationship. You will be asked to enter your PIN.

- o Once NCPDP verifies the new relationship, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The relationship will be added to your list of active relationships. You can then associate this relationship with one or more of your NCPDP Provider ID pharmacy profiles *(see 4.2 Change of Relationship/Payment Center)*.

   If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update an existing relationship, click the **Update** link associated with the relationship.

- o Make any changes to the existing relationship information. As with creating a new relationship, required information (noted with a RED *) must be complete.

- o Click **Save** to save changes. Once NCPDP verifies changes to your relationship, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing relationship, click the **Deactivate** link associated with the relationship. You will be asked to enter your PIN. You can only deactivate a relationship if NO active NCPDP Provider ID pharmacy profiles are associated with the relationship.

- o Once NCPDP verifies your relationship deactivation, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*.

11.3 Manage Parent Organizations

If you have more than one relationship, it is recommended that you create a Parent Organization.

To manage parent organizations:

1. Click the **Tools** tab.

2. Click the **Manage Parent Organizations** link in the **Relationships and Users** box.

3. To create a new parent organization, click the **Create New Parent Org** link in the **Actions** box.

- o Enter the required information (noted with a RED *), which includes Group Name and Email address.

o Click **Submit** to create the parent organization. You will be asked to enter your PIN.

o Once NCPDP verifies the new parent organization, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The parent organization will be added to your list of active parent organizations. You can then associate this parent organization with one or more of your relationships *(see 7.2 Manage Relationships)*.

   If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update an existing parent organization, click the **Update** link associated with the parent organization.

   o Make any changes to the existing parent organization information. As with creating a new parent organization, required information (noted with a RED *) must be complete.

   o Click **Save** to save changes. Once NCPDP verifies changes to your parent organization, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing parent organization, click the **Deactivate** link associated with the parent organization. You will be asked to enter your PIN. You can only deactivate a parent organization if NO active relationships are associated with the parent organization.

   o Once NCPDP verifies your parent organization deactivation, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*.

11.4 Manage Payment Centers

You may require one or more payment centers for your organization.

To manage payment centers:

1. Click the **Tools** tab.

2. Click the **Manage Payment Centers** link in the **Relationships and Users** box.

3. To associate a specific NCPDP Provider ID with an existing payment center, *see 4.2 Change of Relationship/Payment Center*. To create a **new** payment center, click the **Create New Payment Center** link in the **Actions** box.

   o Enter the required information (noted with a RED *), which includes Group Name, Effective Date and Email address. Because this is a payment center (versus a relationship), it is important that you enter the address and authorized official information.

- o Click **Submit** to create the new payment center. You will be asked to enter your PIN.

- o Once NCPDP verifies new payment center, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. The payment center will be added to your list of active payment centers. You can then associate this payment center with one or more of your NCPDP Provider ID pharmacy profiles *(see 4.2 Change of Relationship/Payment Center)*.

  If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update an existing payment center, click the **Update** link associated with the payment center.

- o Make any changes to the existing payment center information. As with creating a new payment center, required information (noted with a RED *) must be complete.

- o Click **Save** to save changes. Once NCPDP verifies changes to your payment center, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*. If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To disassociate an NCPDP Provider ID from an existing payment center, *see 4.2 Change of Relationship/Payment Center*. To deactivate an existing payment center, click the **Deactivate** link associated with the payment center. You will be asked to enter your PIN. You can only deactivate a payment center if NO active NCPDP Provider ID pharmacy profiles are associated with the payment center.

- o Once NCPDP verifies your payment center deactivation, you will be alerted based on your alert preferences *(see 3.4 Change Your Alert Preferences)*.