What's New in DrugPak 6.0?

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Version 6.0.70507

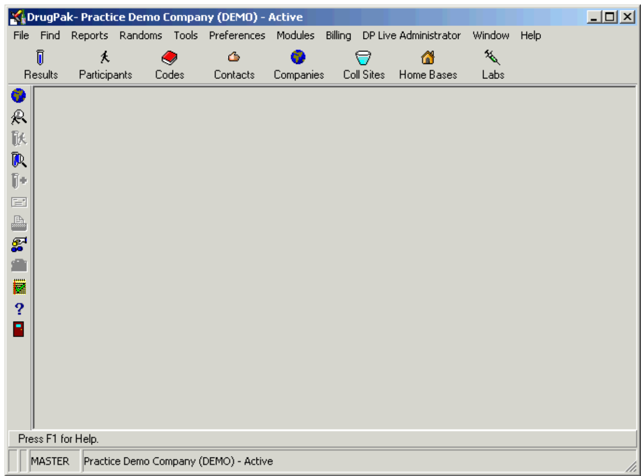
Table of Contents

Part I

1 Overview

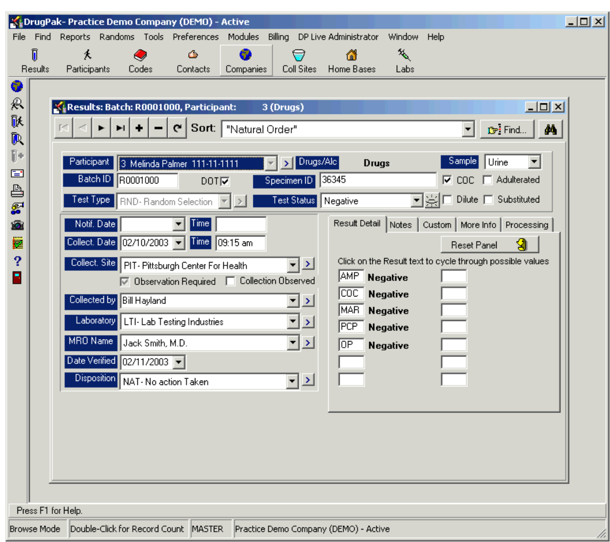
1.1 Main Form/Window

DrugPak now features a Multiple Document Interface (MDI). This means that you can have multiple "forms" or "child-windows" simultaneously open within the main ("parent") window. Previously, each page or form in DrugPak was represented by a tab. (DP Informer and/or DP Document Manager users will be familiar with this type of interface.)



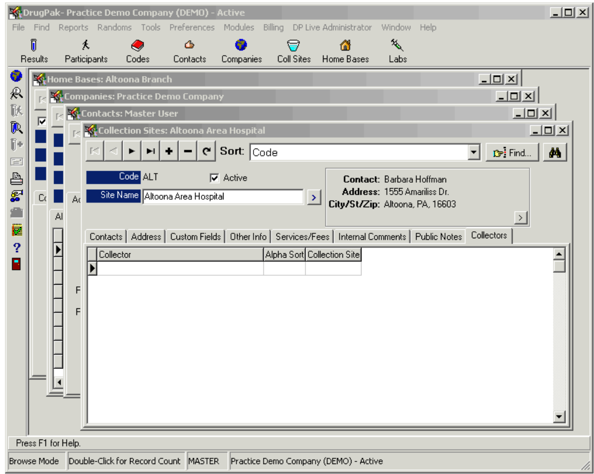
Main DrugPak window with no "Child" windows open

- Pressing any of the buttons (Results, Participants, Codes, etc.) in the top will open a corresponding form within the main DrugPak screen.



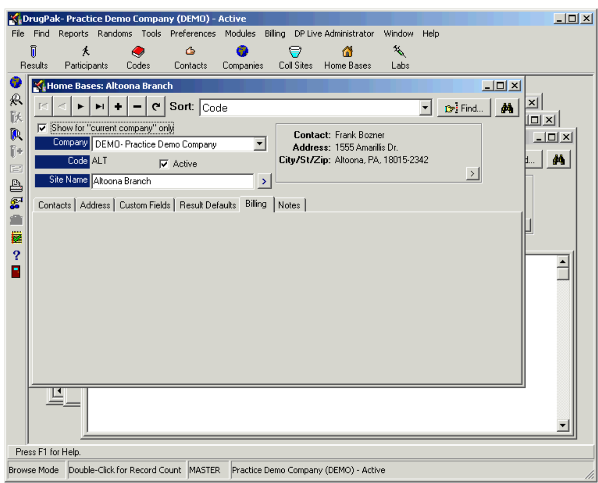
Main DrugPak window with just Results window open

- You may open as many or as few child windows as you like.



Main DrugPak window with several windows open

- Clicking on the title bar of any child form will bring that window to the front (making it viewable and editable).



Main window with Home Base window visible

- To return to a form that is underneath another window simply, choose Window > {name of form}, File > {name of form}, or press the corresponding button along the top of the main window.
- To close all the forms (and return to the main screen), press Control + Alt + C.
- If you prefer, you may also maximize any form to fill the entire DrugPak screen (by using the standard maximize function on any form).

1.2 Add Location Wizard

A multi-step wizard has been added to help you when you are adding a company, home base, collection site, or lab. Previously, when you pressed the + button, DrugPak would go into edit mode, and allow you to enter the appropriate information. In version 6.0, when you want to add a company, home base, lab or collection site, press the + button, DrugPak will walk you through a wizard which will prompt you for a full name of the location, a code, a physical address, the primary contact (which can be changed if desired), the contact's address (you can use the physical address, or manually enter a different address), and a Billee (if DrugPak Billing is installed and licensed).

1.3 Home Bases, Collection Sites and Labs

Formerly, in version 5.x, home bases, collection sites and labs were entered and edited within the Contacts tab. In version 6.0, each of the above listed items has their own window. These are all accessible via their respective button along the top of the main DrugPak form or from the File menu. Additionally, there will be a contact record for each of these locations. The name of the contact will be the name entered in the contact field of the lab, collection site and/or home base in DrugPak 5.x. *See the What is a Contact? subject for information on the new Contacts database.*

If the contact field for Companies, Home Bases, Collection Sites, or Labs in version 5.x was blank, the 6.0 upgrade will generate Contacts with auto-generated names in the following format: Collect: {site name} / Lab: {site name} / Home base {site name}.

1.4 Report Settings

In version 5.x, each report had its own unique window. In version 6.0, most reports have one standardized interface. This makes finding the settings easier to find. Additionally, you can assign a report to a contact, give it a unique name, and save it for future use. *See the Reports topic for more information.*

1.5 DP Informer Functions

The functions (except for the Transmission Center) and settings for DP Informer have been incorporated into the DrugPak Main Module. All company preferences have been converted into contact. *See the DP Informer topic for more detailed information.*

1.6 DP Live Administrator Functions

The functions (except the Falcon Web Server) and settings for DP Live have been incorporated into the DrugPak Main Module . All DP Live Users have been converted into contact. *See the DP Live topic for more detailed information.*

1.7 DP Billing Functions

The DP Billing functions, settings, and calculation expert have been incorporated into the DrugPak Main Module. *See the DP Billing topic for more information.*

1.8 Participant Import

The new Participant Import Wizard allows you to import directly from an Excel* file. (It is no longer necessary to export an Excel file to a CSV (comma separated vales) file.) Also included in the wizard is an improved interface to match fields in the Excel file with DrugPak fields - you can now see the data in the Excel file while you are viewing the Import Wizard. This will make it much easier to link each column to a DrugPak field. A further enhancement to the Import Wizard is that you can now import participant lists into multiple DrugPak companies at once!

** Microsoft Excel must be installed on the workstation to import files in Excel (*.xls) format.*

Part II

2 Contacts Database

2.1 What is a Contact?

A contact is a person associated with one or more locations. This individual may be the contact for a company, home base, collection site, lab, or third party. They may also be a DrugPak user, an MRO, or a DP Live user. A contact can be set up to receive reports, log on to your DP Live site* and/or call in and get results through Facts-on-Demand **

An important feature of a contact is that you can choose what a contact can or cannot see in their reports and via DP Live*. This is done through the use of Permissions and Locations. This can be done broadly for a contact, or more specifically on a per-report basis.

** DP Live license is required*
*** Facts-on-Demand license is required*

2.2 Address Tab

Enter the contact's street address, city, state, zip, fax number (required if this contact is to receive faxed reports via DP Informer*), and e-mail address(es) (required if this contact is to receive e-mailed reports via DP Informer*). Use the optional notes field to enter any additional information about the contact.

** DP Informer is licensed separately.*

2.3 Additional Tab

Optionally enter any additional dates, true or false values, or sort order values. By default these are labeled Date 1, Date 2, Sort 1, Sort 2, etc. To change the labels for the fields, go to Preferences > Global Settings > (Main Module) > Contact Options, change the label to reflect the desired text, then press the Apply button.

2.4 Reports Tab

In version 6.0, in addition to being able to print reports as needed from the reports menu, you can also assign individual reports to contacts. Each contact-specific report will have its own settings and can have a unique title (such as Dave's Participant List). The advantage of this is that if you have multiple people who receive the same report, each person (contact) can have their own report with their desired settings. The following options are available in the Reports tab:

- **Add Report:** This will present a list of available report grouped by category.
- **Edit Report:** After selecting an existing report, this will allow you to modify and save the report's settings.
- **Remove Report**: Allows you to remove a report from a contact.
- **Print Report:** Allows you to print a report that has been saved for this contact.
- **Change Cutoff:** Allows you to change the cutoff date for data to be included in a report. This setting is used for results letters, results lists, and random selection reports. Any result entered or modified *after* the cutoff date and time will be included the next time the report is generated or printed. Changing the cutoff date to an earlier date will widen the scope of the report.
- **Report Info:** After choosing a report, this will display a window showing the number of records that will be included in the report.

2.5 Task Options Tab

The Task Options include the settings that were previously in Company Preferences in DP Informer version 5.x. These settings include default status, e-mail cover file, e-mail format, encryption password, fax cover file and dial prefix.

2.6 Remote Access Tab

The Report Access tab includes settings that were previously in the DP Live Administrator User Accounts. These settings include User ID, Password and Skin. Also in this tab is the Facts-on-Demand settings that were previously in Company Preferences in DP Informer. These settings include Account Number and Account PIN.

Note: This tab will not be visible to DrugPak users who do not have DP Live installed and licensed.

2.7 Permissions Tab

Permissions are settings that determine which records a contact can view via reports. Previously, only DP Live Users had permissions (Record Access Overrides and Field Access Overrides). Now, *all* contacts have permissions. The settings include:

- **Security Profile:** The security profile sets a base level of permissions (security profiles are accessible from the DP Live Administrator menu).

- **Company Data Access Based On:** A contact can view data based on Location (set in the Location tab), Consortium (set by choosing a consortium from the menu when this option is chosen), or Filter (which is created in the filter panel at the bottom of the window).

2.8 Locations Tab

This setting determines which records will be viewable/printable by this contact. Locations include company, home base, lab, collection site, lab, third party, and MRO (e.g., a contact named Kathy Hopkins is linked to a company named Alpha Trucking -- when any reports are generated for Kathy Hopkins, *only* records attached to Alpha Trucking and/or its participants will appear in the report.)

To add a location, press the Add Location button at the button left, and choose which type of location you wish to add (company, home base, lab, etc.). Once you have chosen which type of location you would like to add, press the Add {location type} button and choose the desired location from the Find window, and press the Okay button. This new location will now appear in the list of locations in the Locations tab.

Note: the location(s) chosen in the Locations tab will determine record access for this contact ***only*** when the *Company Data Access Based On:* setting in the Permissions tab is set to Location. If the *Company Data Access Based On:* setting in the Permissions tab is set to either Consortium or Filter, then this contact's record access will be determined by the chosen *consortium* or *filter*.

Part III

3 Modules

The functionality and interfaces for the DrugPak Live, DrugPak Informer, and DrugPak Billing modules have been absorbed into the main DrugPak Module. This allows for quicker access to each module.

Note: the following subjects apply to those users who have the modules in question installed and registered. If you have none of the above-mentioned modules installed and registered, you may skip this section. If you have just one or two, please read their respective sections.

3.1 DP Informer

3.1.1 Task Generator and Task List

Task List

The Task List can be accessed via the button on the main toolbar or by choosing Task List from the Informer menu.

Task Generator

The Task Generator has been renamed Report Generator and can be found under both the Reports menu and the Informer menu.

Company Scope

Since you can now print, fax and e-mail based on any location (i.e., not just companies and/or home bases), the company scope has been removed. It has been replaced by two menus - Location Type and Location

Location Type

Location types include company, home base, lab, collection site, consortium, MRO, (DrugPak) user, and third party. You may choose all location types.

Location

When a location type is chosen, this menu is enabled, and allows you to choose All, or select an individual location.

Report Categories

Version 6.0 Informer can generate and send nearly any DrugPak report, not just result letters result lists. Because of this expanded capability, the new Report Generator (formerly known as the Task Generator) includes a list (at the left) of report categories. To see which reports are in each category, click the + next to the category. You can choose a specific report or multiple reports within a category by clicking the check box next to the report(s) you wish to generate. Alternately, you can choose an entire category of reports by clicking the check box next to the report category name. For example, if you want to generate all random selection reports, click the check box next to Random Selections, and the report generator will generate all random selection reports - Eligible Pool List, Selection List, Alternates List, Notification Letters, and Certification Letters. The reports generated in 5.x are Results Letters and Results List, and can be found within the Results category.

See the main DP Informer topic in the DrugPak help file/users manual for a full description of the functionality of the new report generator.

3.1.2 Company Preferences

Company Preferences

Previously, companies and home bases that received result letters and/or result lists via fax and/or e-mail were stored in Company Preferences records in DrugPak Informer. With version 6.0, these preferences have been converted into contacts (i.e., anyone who can receive reports). One contact will be created for each company preference. Assuming that the Company Preferences were set up to receive faxes and/or e-mail reports, the newly-created contact record in DrugPak 6.0 will have at least one report associated with it - one for faxes and/or one for e-mail. *(Contacts can be accessed by clicking the Contacts button (along the main button bar along the top of the DrugPak window), by selecting File > Contacts, or by pressing Ctrl + 4.*

Alternate Contact

The name (if any) from the Alternate Contact field is used to create the new Contact in the contacts database in version 6.0. For example, if you had entered James R. Smith as the Alternate Contact for the Alpha Trucking company preference in version 5.x, there will now be a contact named James R. Smith linked to Alpha Trucking in the new 6.0 contacts database. This new contact will have all the information and settings (filters, e-mail addresses, fax numbers, etc.) from the 5.x company preference.

> *For example, let's assume you had three company preferences for a company called Zebra Trucking: one for the company, and one each for its two home bases - North Terminal and South Terminal. Assuming that the you had entered a contact name for Zebra Trucking (e.g., Jack Johnson), and contact names for each of the two home bases (e.g., Edward Simonson - North Terminal and Sarah Templeton - South Terminal), you will now have **three** contacts in the contacts file in DrugPak 6.0 - Jack Johnson, Edward Simonson, and Sarah Templeton. So, instead of a Company Preference being associated with a company or home base (as they were in 5.x), you now have contacts that are **linked** to one (or more) location(s). Thus, Jack Johnson will be linked to Zebra Trucking, Edward Simonson will be linked to the North Terminal home base and Sarah Templeton will be linked to the South Terminal home base. **If the Alternate Contact field was blank in the 5.x company preference, the Display Name of the contact in 6.0 will come from the contact field of the associated company or home base. If both the contact name in the 5.x company record and the alternate contact in 5.x DP Informer were blank, then the new 6.0 contact will have a display name of "Informer Recipient: #".***

Extra Result Filter

This filter (if any) has been moved to the Custom Filter setting for the contact's report.

Fax Settings

- The **Fax Number** has been moved to the Fax field in the Contact's Address tab.
- The **Dial Prefix** and **Cover File** settings have been moved into the Task Options tab.
- The **Report Style** has been used to create a report for the associated contact in the Report tab.
- The "Letter format" report style in version 5.x will create a "Results Letter" report for the contact in version 6.0.
- The "One-line format" and "Two-line format" report styles in version 5.x will create a "Results List" report for the contact in version 6.0.
- The **Reportable Statuses** (NPCRO) have been converted into a filter on the Result Status table in the contact's Permissions tab. Version 6.0 does not use N, P, C, R, or O. These have been replace with status categories 1 - Negative, 2 - Positive, 3 - Excused, 4 - Refused, 5 - Not Performed, 6 - Inconclusive, and 0 - Unknown. *Note that "canceled" has been replaced by "excused."*
- The **Send ASAP**, **Default Status** and **Message** settings and text have been moved to contact's Task Options tab.

E-mail Settings

- The **E-mail Address**(es) has/have been moved to the contact's Address tab.

- The **Body Message File** setting has been moved into the Cover file field in the contact's Task Options tab.
- The **Export Class** setting is used to set the "destination" (screen/printer/file/e-mail/fax) of the report that is created for the contact.
- The **File Type** has been moved to the Export option field in the contact's Task Options tab.
- The **Report Style*** is used to create a report for the associated contact in the Report tab.
- The "Letter format" report style in version 5.x will create a "Results Letter" report for the contact in version 6.0.
- The "One-line format" and "Two-line format" report styles in version 5.x will create a "Results List" report for the contact in version 6.0.
- The **Encryption Password** has been moved to the contact's Task Options tab.
- The **Reportable Statuses** (NPCRO) have been converted into a filter on the Result Status table in the contact's Permissions tab. Version 6.0 does not use N, P, C, R, or O. These have been replace with status categories: 1 - Negative, 2 - Positive, 3 - Excused, 4 - Refused, 5 - Not Performed, 6 - Inconclusive, and 0 - Unknown. *Note that "canceled" has been replaced by "excused."*
- The **Send ASAP**, **Default Status** and **Message** settings and text have been moved to contact's Task Options tab.

All the options found in a contact's Task Options tab can be (optionally) overridden in individual reports.

If you have custom reports, please contact the DrugPak Technical Support Department at support@drugpak.com to have your custom reports upgraded to the new 6.0 database architecture.

3.1.3 Transmission Center

The transmission center functionality is the same as in 5.x, and is now available under the Informer menu.

3.1.4 Broadcaster

The broadcaster functionality is the same as in 5.x, and is now available under the Informer menu.

3.1.5 Communication Settings

The communications settings functionality is the same as in 5.x, and are now available under the Preferences menu.

3.2 DP Live

All the functions (except for the Falcon Web Server) and settings for DrugPak Live have been moved into the DrugPak Main Module:

DP Live users have been converted* into contacts. Choose User Accounts from the DP Live Administrator menu to display only those contacts that have a DP Live user ID. The window automatically opens to the Remote Access tab. The user's security profile, record access overrides and field access overrides are now found in the Permissions tab

User ID and Password

These can be found in the new contact's Remote Access tab.

Company

The DP Live user's company access is now determined by the setting for "Company Data Based On" setting in the Permissions tab (and the corresponding filter, consortium or location(s) (in the Locations tab)). If the 5.x DP Live user was set to see just one company, that company will be converted into a filter in 6.0 that determines whose records the contact/DP Live user sees. If you want to change or add companies to a contact, it is best to set the "Company Data Based On" setting to Location, then go to the Locations tab, and choose the appropriate location(s).

Security Profiles
A contact's security profile is found in the Permissions tab. The Security Profiles window is now an item in the DP Live Administrator menu.

Skin
The contact's skin is set in the Permissions tab.

Record Access Overrides and Field Access Overrides
These two sets of settings have been combined into the Permissions tab in version 6.0. See the full DrugPak help/users manual for a detailed description of these features.

Tools
The items formerly found in the tools menu (DP Live Login page, start/stop DP Live, Refresh DP Live, etc.) are now found in DP Live Administrator > Remote Admin menu.

If a 5.x DP Live user that did not have a name, that user will be converted into a contact with the a name in the following format: DP Live User: {User ID}.

3.3 DP Billing

3.3.1 Settings

The billing options in DP Billing 5.x have been converted into Billing Profiles, Billees, and Price Schedules. *Please see the DP Billing help file/users manual for a full description of each feature and setting.*

- A company has a billee.
- That billee is associated with a contact (the person who received the invoice)
- The billee is assigned a billing profile, a price schedule and an (optional) additional rule set

Company profiles
Company billing profiles have been converted into Billing Profiles (Billing > Billing Profiles). The billing profiles names are based on the Company ID in DrugPak.

Billee
New to version 6.0 is a "billee." A billee represents an "account" entity that can be billed. A billee record consists of a contact and a set of billing preferences that is assigned to a company and/or home base.

General Tab
Except for the Bill to Parent Company option, all options from the General tab in 5.x have been moved to the Billing Profile.

Invoice Layout Tab

Line Itemization
If the Summarize by Test Type was chosen in the 5.x billing profile, the corresponding 6.0 billing profile's Summarize Line Items on Invoice box will be checked.

Line Item Detail Text
Each group of Line Item Detail text settings in 5.x. will appear in the drop-down menu on the billing profile window.

Invoice Form Name, Group Invoice Items, and New Page on Group Change
These items have been moved to the billee (the person who is to receive the bill.

Show Positive Test Count Column
This setting has been moved to the invoice report for the contact that is associated with the billee.

Payment Terms, Invoice Message, and Repeat on Every Page
These settings have been moved to the billee.

Discount Tab
All items have been moved into a Discount Profile within a Billing Profile. A new discount profile will be created from each 5.x billing profile that was set to not use the default discount profile.

Test Type Fees
These fees in have been converted into Price Schedules. At least one price schedules is created from the DEFAULT 5.x profile. (Two price schedules will be created if the DEFAULT profile had Positive Test Surcharges set.) Additionally, one price schedule will be created for each non-DEFAULT 5.x profile that was not set to use either Default Base Charges or Test Type Specific Charges. (Two price schedules will be created if the profile had positive test surcharges.)

Canceled Test Charges
These setting have been moved to the Billing Profile

Collection Site Charges
These charges have been converted into Price Schedules. One price schedule is created for each company-specific collection site that does not use the Default Basic Charges and/or Test-Type Specific Charges and for which prices had been set. Additionally, one price schedule is created from the DEFAULT-specific collection site charge (if prices had been set). And like test-type fees, a second price schedule is created when positive test surcharges have been set.

Lab Charges
These charges have been converted into Price Schedules. One price schedule is created for each company-specific lab that does not use the Default Basic Charges and/or Test-Type Specific Charges.

Miscellaneous Charges
These have been moved into their own window, and are accessible from the Billing menu.

3.3.1.1 Billees

A DrugPak billee represents an "account" entity that can be billed.

- A billee record consists of a contact and a set of billing preferences that is assigned to a company and/or home base
- A company or a home base has only one billee *(However, it is possible to use billing rules to split company charges among multiple billees)*
- Each billee can be assigned to multiple home bases and/or companies
- Multiple billees can be assigned to a single contact
- You can reassign a billee's contact, so future bills are sent to a different person

Account Number
This number will appear in the "Account Code" field of the invoice. This account number is created from the company's account number. However, changing a billee's account number will *not* change the

company's account number (or vice-versa).

Contact

This is the person who is to receive the invoice. The contact associated to the billee is either the Alternate Billing Address (for invoice)" in version 5.x (if provided), or the name and address of the company associated with the billing profile in version 5.x. To edit the contact's record, select a different contact for this billee, or to create a new contact for this billee, press the > button to the right of the contact's name.

Active

This check box must be checked on for an invoice to be generated for this billee.

Settings Tab

- **Billing Profile:** The billing profile contains settings for test price schedule, charging for excused tests, line item detail text, additional rule sets, collection site charges, lab charges, discounts, taxes and administrative charges. Each billee has a profile based on the settings in the 5.x billing profile. Optionally, you can find, edit, or add a billing profile by pressing the > button to the right of the billing profile drop-down menu.
- **Price Schedule:** The price schedule contains the prices for collection site charges, lab charges, test fees and positive test surcharges. By default, the price schedule will be the price schedule defined in the billing profile. Optionally, you can find, edit, or add a price schedule by pressing the > button to the right of the price schedule drop-down menu.
- **Additional Rule Set:** This is an optional feature that allows you to create custom rules to modify or add to fees. For example, you might want to charge a different price for an on-site test, or charge extra for a hair test. Any custom rule sets that you created in 5.x will now be found here. You can find, edit, or add a rules by pressing the > button to the right of the additional rule set drop-down menu.
- **Customer Since:** This refers to the date that the company that this billee is assigned to became a customer and is necessary for applying a seniority discount.
- **Invoice Form:** In 5.x, logo.rpt was used in order to allow for a logo or letterhead image to appear at the top of the invoice (i.e., form.rpt could not display a logo or letterhead image). In version 6.0, both reports can display a logo or letterhead. The reports are identical. To add, remove or change the letterhead for either invoice form, go to Preferences > Global Settings > Main Module > Virtual Letterhead.
- **Secondary Print Order, Ignore Print Order Field:** These behave as they did in 5.x. Previously, they were in the calculation wizard.
- **Group Invoice Items, New Page on group change, Payment Terms, & Invoice Message:** These behave as they did in 5.x. Previously, they were in the invoice layout tab of the billing module.
- **Use default terms & Use default message:** You may choose to manually enter payment terms and/or invoice message to appear on invoices for this billee, or use the default message from the global settings (Preferences > Global Settings > Billing Module General Options).

Misc. Charges Tab

Miscellaneous charges associated with this billee (if any) are displayed in this grid. There are also options to show or hide recurring charges, participant charges, home base charges, result charges, and company charges.

Miscellaneous charges have more options: recurring charges (e.g. annual fees), and linking charges to multiple records. *Previously, miscellaneous charges could be linked to only to a billing profile and (optionally) to a home base, in version 6.0, miscellaneous charges are linked to at least a billee, and can also be linked to a company and/or home base and/or participant and/or test result.*

Location Tab

All companies and/or home base linked to this billee are displayed in this grid. Double-clicking a location will open the corresponding company or home base window.

Invoice History

Invoices generated for this billee (if any) are displayed in this grid. To re-print an invoice, right-click an invoice record and choose Print Invoice.

3.3.1.2 Billing Profiles

Similar to the billing profiles in 5.x, a billing profile in 6.0 contains settings that determine price schedules, line item detail text, additional rules, collection site charges, lab charges, discounts, taxes and administrative charges.

Name

Name given to the billing profile. This comes from the company ID of the billing profile in 5.x.

Test Price Schedule

Unless the price schedule is determined in the company's price schedule, the home base's price schedule, or the billee's price schedule, the price schedule chosen in the billing profile will be used to set prices for tests. Optionally, you may find, edit, or add a price schedule by pressing the > button.

Charge for excused tests

This function behaves as it did in 5.x. (Canceled tests are now referred to as excused tests.) Previously, it was found in the Test Type Fees tab.

Summarize line items on invoice

This function behaves as it did in version 5.x. Previously, it was found in the Invoice Layout tab.

Test Line Item Detail Text (optional, but recommended)

This function behaves partially as it did in version 5.x. The detail test settings set in the 5.x billing profiles will be displayed in each billing profile in version 6.0 (typically $PN, $PS (to display the participant's Social Security Number and name)). In order to modify or add detail text, we have added additional functionality: previously you were limited to certain codes and names, you may now display either the code or description for nearly any DrugPak data. To find, edit or add detail text, choose the appropriate option from the > button.

Test Charges Rule Set (optional)

Custom billing rules created in 5.x have been converted into Rule Sets. Rule sets that are to be applied to this profile will be displayed here. Previously, billing rules were saved in the Custom Rules window (available from the File menu). To find (select), edit or add a rule set, press the > button.

Collection Site Charges

Collections site charges in 5.x have been converted into price schedules. Each combination of collection site and billing profile in 5.x will have created a separate price schedule in 6.0 (e.g., if you had non-zero prices for collection site ABC in billing profile 123, and non-zero prices for the same collection site (ABC), but for a different billing profile (456), then two collection site price schedules will have been created: "C-ABC / 123" and "C-ABC / 456"). In our fictional example, if you were to look in the Billing tab of collection site ABC, you'd see two prices schedules.

You may choose to allow the collection site charges be determined by the price schedule(s) associated with the collection site by using the (default) "Controlled by Collection Site" option, or choose a specific price schedule by choosing one from drop-down menu. Optionally, you may find, edit, or add a collection site price schedule by pressing the > button.

The check box must be turned on for collection site charges to appear on invoices.

Laboratory Charges

Lab charges in 5.x have been converted into price schedules. Each combination of lab and billing profile in 5.x will have created a separate price schedule in 6.0 (e.g., if you had non-zero prices for lab ABC in billing profile 123, and non-zero prices for the same lab (ABC), but for a different billing profile (456), then two collection site price schedules will have been created: "L-ABC / 123" and "L-ABC / 456"). In our fictional example, if you were to look in the Billing tab of lab ABC, you'd see two prices schedules.

You may choose to allow the lab charges be determined by the price schedule(s) associated with the lab by using the (default) "Controlled by Lab" option, or choose a specific price schedule by choosing one from drop-down menu. Optionally, you may find, edit, or add a lab price schedule by pressing the > button.

The check box must be turned on for lab charges to appear on invoices.

Discount Profiles (optional)

Discount settings (if any) created in the Discounts tab of version 5.x have been converted into separate Discount Profiles. The name of the discount profile is based on the company ID of the 5.x billing profile. The options available for discounts are identical to those available in version 5.x. You may choose not to apply discounts for this billing profile by picking "(Not Selected)" from the drop-down menu, or choose an existing one (if any) from the drop-down menu. Additionally, you may find (select), edit or add a discount profile by pressing the > button.

Tax Profile (optional)

Tax settings (if any) created in the General tab of version 5.x have been converted into separate Tax Profiles. The name of the tax profile is based on the company ID of the 5.x billing profile. The options available for discounts are identical to those available in version 5.x. You may choose not to apply discounts for this billing profile by picking "(Not Selected)" from the drop-down menu, or choose an existing one (if any) from the drop-down menu. Additionally, you may find (select), edit or add a tax profile by pressing the > button.

Administrative Charges (optional)

Administrative charges (if any) created in the General tab of version 5.x have been converted into separate administrative charge profiles. The options available for administrative charges are identical to those available in version 5.x. You may choose not to apply administrative charges to this billing profile by picking "(Not Selected)" from the drop-down menu, or choose an existing one (if any) from the drop-down menu. Additionally, you may find (select), edit, or add an administrative charge profile by pressing the > button.

3.3.1.3 Price Schedules

A price schedule is a set of prices.

- Test price schedules can be assigned to a home base, company, billee and/or billing profile
- Test price schedules will be used in this order: home base > company > billee > billing profile (i.e, the billing calculation will look first for a price schedule assigned to a test's home base; if it doesn't find one, it will then look for a test price schedule assigned to the company...and so on).
- Lab price schedule can be assigned to only labs

- Collection site price schedules can be assigned to only collection sites

Category
A price schedule refers to prices for any of three categories:
- Collection Site
- Laboratory
- Test

Positive Test Schedule
This refers to the prices schedule (if set) that will be used for positive tests. Press the > button to:
- Select a price schedule
- Edit current price schedule
- Create a new price schedule

Price Grid
The grid displays the charges for this price schedule for non-DOT drug, DOT drug, non-DOT alcohol, and DOT alcohol tests.
- When the test type is "Standard", the charges will be assigned for *all* test types
- If you have more than one set of prices, the billing calculator will first look for a test-type-specific price; if one is available, it will be used, if not, the "standard" price (if set) will be used.

3.3.1.4 Billing Rules

The billing rules editor allows you to add, remove and edit the actions, conditions, and prices for a rule. Rules created in 5.x will create rule sets in 6.0. *Please see the DP Billing help/ users manual for full details on the use of billing rules*

3.3.1.5 Charge Types

A charge type is a potential line-item on an invoice. When DrugPak's billing calculation processes a result record one or more charge types can be triggered. Any charge type that is triggered by a result record will cause a line item to appear on the invoice, so one result can have as many line items associated with it as necessary. An exception to this rule is that there is a Global Setting | General Options to "Bundle" lab and collection site charges which will cause these either/both of these charge types to be bundled with the test type charge type.

3.3.1.6 Discount Profiles

Discount settings operate as they did in version 5.x. However, now you can create individual discount profiles, and then those discount profiles to billing profiles. Discount profiles are optional.

3.3.1.7 Tax Profiles

As in version 5.x, tax rates are set in the G/L account(s) in Preferences > Global Settings > Billing Module > G/L Accounts. In version 6.0, you may create multiple tax profiles with each with one or two tax liability G/L accounts. These tax profiles (if used) are applied to the Billing Profile. Tax profiles are optional.

3.3.1.8 Administrative Charges

As in version 5.x, administrative charges can be applied. In version 6.0, multiple administrative charge profiles can be created. An administrative charge profile is applied to the Billing Profile. Administrative charges are optional.

3.3.2 Billing Expert

The billing calculation expert has been modified:

1. From the Billing Menu, choose Billing Expert. As in 5.5, you choose the company scope, date range field, billing period's start and end dates, and the default date for line items. Optionally, you may add a filter condition to limit the scope of items to bill for.
2. After the calculation, you will be prompted to print proof lists for the totals summary, G/L sales journals, and the exceptions report. You may choose individual reports, no reports (by pressing the None button), or all reports (by pressing the All button).
3. After proof lists have been printed (or skipped), you will be prompted to accept or reject the invoice (s).You may review the line items and the invoice(s) before accepting them. If there are any invoices that are incorrect (due to incorrect price, missing lab, etc.) you may reject them. You can reject one invoice or all invoices.   After accepting or rejecting, you will be prompted to verify you choice. (Invoice(s) rejected will be removed from the list, and will *not* be finalized.) Once you are satisfied that the invoices are complete and accurate, you should accept them. You will be prompted to verify your choice. Once accepted, the invoices will be final. *There is no way to "unaccept" an invoice.*
4. After invoice(s) have been accepted, you will be prompted to print audit trails and invoices. Choose which reports to print and how/when to print them. The "Use contact's delivery settings" will send the reports/invoices to the destination(s) set in the Invoice report of the contact associated with the billee.
5. After printing, you will be prompted to verify that the report(s) have printed successfully. Pressing Yes will take you to the last step; pressing "No, I want to try again" will take you back a step.
6. If you chose to export your invoices (Preferences > Global Settings > Billing Module > Require A/R export prior to final processing), you will be prompted with the Translation Engine Control Panel. (The translation process is identical to version 5.x.)
7. After answering the "Did the Audit Trails and Invoices Print Successfully?" prompt (and completing the translation if you export your invoices), your billing calculation is complete. You will be presented with the final Billing Expert window.
8. Press Next to return to the first Billing Expert step. Press Close to return to the main DrugPak window.

3.4 MRO Management

As with the main module of DrugPak, MRO Management also has the "MDI" interface (i.e., you can have multiple "forms" or "child-windows" simultaneously open within the main ("parent") window.)

Additional Global Settings

Automatically Export Results with No Exceptions
You have the option to apply this option to DOT tests, non-DOT tests, or both.

Auto MRO-Verify...settings
These two settings in 5.x have been combined into one setting label with two check boxes: one for DOT and one for non-DOT.

Record an Exception if Matching Random Test in DrugPak has a Different DOT Status

If the DOT status of the random test in MRO Management does not match the DOT status of the corresponding open random test in DrugPak, optionally report an exception.